

Defining our professional future:

Report to CILIP Council

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Prepared by

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Section 1: Executive summary

1.1. Working environment

- Those working in the knowledge and information domain are experiencing increased demands placed upon them, coupled with a perceived fall in staffing levels. Financial restraints are seen as the key driver for these changes.
- The vast majority (8 in 10) agree that there is increased pressure to provide a high standard of service with a smaller budget, and almost three-quarters agree that there is an increasing need to act in a more businesslike manner (providing business cases, costings, etc.)
- Looking ahead 10 years, those in the knowledge and information domain expect their working environment to evolve significantly. Four in five predict a continuing rise in self-service facilities and three-quarters expect staffing levels to decrease. The proportion of qualified staff is also expected to decline.
- Shared resourcing and outsourcing is likely to become much more commonplace.

1.2. Technological developments

- The vast majority of the knowledge and information domain (8 in 10) are engaging with new technologies as part of their day-to-day work. Around 6 in 10 currently work with digitised resources and e-books, which are expected to have the greatest impact on their work in 2020.
- Almost all agree that technological developments have changed the way that people search for information and that, in response, the role of the information professional is rapidly changing to embrace these developments, harnessing opportunities to become information literacy enablers and evaluators.

1.3. Professional role and skills

- Those in the knowledge and information domain are employing a wide variety of skills in their current role. Those most commonly used are interpersonal, customer service and ICT skills.
- The more 'traditional' librarianship skills are used by a comparatively small proportion. Cataloguing and classification skills are employed by just under half of those completing this survey, and indexing skills are used by just a quarter.
- For the overwhelming majority, their role is becoming increasingly diverse. However it is argued that the profession's core skills are being overlooked by society (75% say this) and by employers (65% say this).
- Looking at the anticipated skill set in 2020, the diverse role of those in the knowledge and information domain looks set to continue; those involved in the consultation foresee an increase in the use of almost all their skills, particularly

online communication, ICT, business and marketing skills. However it is expected that there will be a decrease in the more traditional skills of classification and cataloguing.

1.4. CILIP today

- The majority of those working in the knowledge and information domain who provide a rating claim that CILIP is neither good nor poor as a professional membership organisation; it occupies the middle ground.
- Perceptions of CILIP are that the organisation is too London-centric, too bureaucratic and too old-fashioned.
- CILIP is rated more positively by those newer to the knowledge and information domain, those working in the schools sector and those who have never been a member.
- In terms of value for money, those surveyed are split. 49% claim CILIP offers very or quite good value, while 51% claim it is very or quite poor.
- Professional qualifications are most frequently associated with CILIP, followed by Special Interest Groups, conferences and events, publications, training and providing advice. Least likely to be associated with CILIP are regulation of the profession, mentoring and supporting members in their work.
- The consultation does not suggest that there is a feeling of being part of a community when a member of CILIP.

1.5. CILIP's future

- Just over half of those in the knowledge and information domain anticipate being members of CILIP in 10 years time. A third say they will not be members, and a further 14% do not know.
- In terms of importance of CILIP activities in the future, members and future members are unanimous; it is imperative that CILIP promotes the profession, advocates the profession and lobbies on policy and legislation.
- Amongst members and those planning to join, half would rather receive CILIP services as part of their membership subscription. A quarter would prefer to pay as and when services are needed, and a similar proportion does not know.

1.6. Information from CILIP

- Those in the knowledge and information domain most commonly acquire information from CILIP via printed publications and the website.
- Over the next 10 years, they envisage placing less reliance on traditional print formats by obtaining the same publications (Update and Gazette) digitised.

- The vast majority rate the information provided by CILIP as very or fairly good, however less positive ratings are given for the advice provided by CILIP, and less participants are able to provide an answer.

1.7. CILIP qualifications and accreditations

- Around half of those in the knowledge and information domain claim the CILIP Chartership (MCLIP) is relevant to their career at present, a similar proportion see it as relevant as an employer or potential employer.
- Encouragingly for CILIP, however, those newer to the knowledge and information domain are the most positive regarding CILIP qualifications and accreditations.
- CILIP Chartership is the one qualification / accreditation expected to maintain a degree of relevance in 2020 to both employees and employers.

1.8. Conclusions and recommendations

- CILIP membership is not immediately associated with any specific core benefits and lacks clarity in its offer. It is therefore not particularly visible to members what they receive for their membership fee. With only 59% of members expecting to have retained their membership over the next 10 years, this should be a primary concern for Council.
- Chartership is currently the main incentive to join CILIP, however those who have worked in the knowledge and information domain for a number of years are placing less relevance on the organisation's qualifications. These members especially suggest that they are receiving little added value as their career and experience develop. There is evidence that, at a more senior level, those in the domain need additional strategy and thought leadership from their professional organisation.
- Members want CILIP to become, above all, a visible campaigning body. This means pro-actively advocating the profession to government, opinion leaders, employers and society as a whole, to ensure the professional function and skills are fully understood, appreciated and resourced.
- CILIP needs to appreciate the environment that those working in the knowledge and information domain are currently working in; increased pressure to deliver quality services with less support and fewer resources. There is a need for supportive services such as advice, guidance, mentoring and coaching, alongside lobbying to ensure that government and employers understand fully the implications of their decisions on those in the profession. For those activities that are currently being carried out, CILIP needs to become much more effective in communicating and promoting them.
- The requirement of those in the knowledge and information domain to have and/or develop business skills also needs to be addressed. Again, advice and support, as well as training courses, are needed to equip professionals with the

skills needed. While these may be in existence, there is a need to make this side of CILIP more visible.

- CILIP must recognise the level of fragmentation that exists across the knowledge and information domain, and the challenge it faces in addressing the needs and aspirations of all working within it. This fragmentation extends as far as language, where there is no universal agreement on terms of reference.
- It is argued that CILIP needs to be more proactive in unifying the different sectors in the domain through its ethical framework; the belief in empowerment through access to information, the value of information in bringing about change, and the belief in social capital. However, it is also recognised that CILIP cannot be 'all things to all people' and that some clearer segmentation in its offer is needed. The successful management of this fragmented domain would, in our view, help engender the culture of community that is not currently evident within the CILIP membership.
- Addressing these points would, we believe, strengthen the understanding of what CILIP is and what it stands for, and create a stronger, more modern and customer-focussed brand. This can lead CILIP away from the midpoint rating that it currently attracts, and create more active promoters.

Section 2: Introduction

2.1. Background

The Chartered Institute of Library and Information Professionals (CILIP) was created in 2002 from the unification of the Library Association and the Institute of Information Scientists. As of 2008, membership stood at 18,490¹.

CILIP was seeking to consult with its stakeholders to inform the development of its operating model and structure for the coming years.

This research needed to include a wide range of stakeholders in an interactive discussion which would identify:

- How the world of knowledge and information domain will develop over the next decade
- How a professional organisation will fit into that domain
- How professional colleagues will engage with that professional association

2.2. Research objectives

CILIP sought to understand how its market and environment is likely to adapt over the next ten years in order to shape its strategic direction and operating model. This project, the Conversation, was the consultation mechanism by which it planned to identify the likely trajectory of the knowledge and information domain, uncovering what information professionals expect of their professional association and how they wish to be supported by this body.

Therefore the objectives of this study were to:

- Identify amongst the widest possible stakeholder group how the industry is expected to develop over the next decade
- Review existing communities and networks to establish the key issues currently being discussed in this regard
- Identify the expected role of a professional association within this evolving environment
- Use existing CILIP membership communities and groups to identify what members expect from CILIP both now and in the future
- Produce practical, clear recommendations for CILIP Council regarding the strategic direction it should adopt

¹ <http://www.cilip.org.uk/filedownloadslibrary/governance/2008.pdf>

2.3. Research context

The Conversation was part of the Defining Our Professional Future programme. Four projects make up the programme:

- **The Conversation**
The Conversation was designed to surface and consider issues, with conclusions reported to CILIP Council. A Project Board was established to manage and facilitate the consultation process, drawn from members of the CILIP community.
- **The Vision**
CILIP Council will synthesise issues from the Conversation, then verify with members and wider stakeholders.
- **The Roadmap**
CILIP Council will develop a Roadmap.
- **Ownership and implementation**
CILIP Council will implement the Roadmap, seeking involvement from stakeholders.

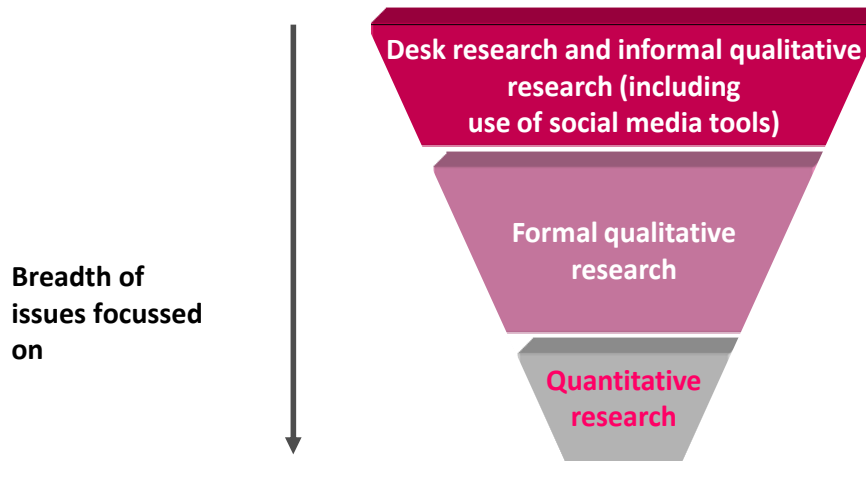
The Project Board did not want to prejudge what the views and issues were likely to be and hence adopted an open approach to consulting with its stakeholders. While both formal and informal approaches to garner views were used, the summative outputs of the study were required to be robust, ensuring credible conclusions and recommendations. They were also required to be gathered independently and objectively, and hence Research by Design (RbD) was commissioned to design and manage the consultation on CILIP's behalf.

2.4. Research methodology

The Project Board proposed an open, interactive system using a number of approaches and methodologies to meet its needs. Following this guidance, RbD developed a multi-stage approach which ensured that relevant stakeholder inputs were gathered, analysed and reported using both informal and formal research tools, going from the initial broad approach to the potential issues, and eventually honing in on the key themes at the end of the process.

A combined desk research and informal qualitative research approach was considered the most effective way to gather the wide range of stakeholder views required without prejudging likely issues. These were then explored and added to in a more formal and structured qualitative stage. Finally, the use of a follow-on quantitative study quantified these views amongst a robust sample of stakeholders (members and non-members of CILIP).

The approach is illustrated in the diagram overleaf:



The following table indicates the various stages of methodology, showing the target audience for each stage, the intended purpose of each element of the study, the tools and sources of information used and the expected outcome of each stage.

	Audience	Approach	Tools and sources	Outcome
Desk research and informal qualitative research using social media tools	Stage 1: CILIP historical research	Review of past market research findings Face to face interviews with relevant industry experts	<ul style="list-style-type: none"> ● CILIP research reports ● CILIP industry experts 	<ul style="list-style-type: none"> ● Identify issues, role for CILIP and support expected for its members
	Stage 2: CILIP membership	Review of CILIP special interest group conversations and stimulate discussions	<ul style="list-style-type: none"> ● CILIP blog ● CILIP's special interest group communities ● CILIP's regional site fora ● CILIP Twitter ● CILIP magazine and Gazette 	<ul style="list-style-type: none"> ● Identify issues, role for CILIP and support expected for its members ● Stimulate discussion
	Stage 3: Non-CILIP members, i.e. industry professionals, in addition to key library commentators and campaigners	Review of existing online sites, communities and publications	<ul style="list-style-type: none"> ● LinkedIn ● Facebook ● Relevant journals ● Relevant websites and blogs ● Twitter 	<ul style="list-style-type: none"> ● Identify issues and potential role for professional body ● Stimulate discussion
Formal qualitative research	Stage 4: Non-CILIP experts and key industry thinkers who have an interest in this sector in addition to key library commentators and campaigners	6 qualitative consultations, primarily face to face depth interviews lasting 30-45 minutes	<ul style="list-style-type: none"> ● Key industry thinkers identified by CILIP 	<ul style="list-style-type: none"> ● Identify expert opinions of future for the industry ● Explore the potential for professional organisations in the industry
	Stage 5: CILIP members	4 focus groups	<ul style="list-style-type: none"> ● Two CILIP regions ● Participants identified by CILIP 	<ul style="list-style-type: none"> ● Explore perceptions of industry trends and direction ● Identify expectations of CILIP ● Understand member needs and requirements
Review	Stage 6: CILIP project management and RbD	Review learning from stages 1 to 5	<ul style="list-style-type: none"> ● Outcomes from stages 1 to 5 	<ul style="list-style-type: none"> ● Identify issues to quantify in next stage of research
Quantitative research	Stage 7: CILIP members and non-members	Quantitative web survey with the aim of c.2000 responses	<ul style="list-style-type: none"> ● Online survey 	<ul style="list-style-type: none"> ● Quantify relative importance of issues identified in stages 1 to 5

2.5. Research sample

Depth interviews were conducted with CILIP members and activists working in the public, national, government and academic sectors. They were also undertaken with experts from the wider knowledge and information domain; examples of their roles are:

- Self-employed information specialist and Internet Consultant
- Director of a literacy charity
- Director of Department of Information Studies (University)
- Content Development Officer, Library and Archival Services
- Head of Knowledge Management, Europe-wide law firm
- Director of Library and Learning Services (University)

Focus groups were conducted with those in the knowledge and information domain working in the following sectors: public / local government; academic; school; charity/special; industrial/commercial; health; government; prison; independent consultancy. Focus group participants were from East Midlands, London, North East, North West, Scotland, South East, South West, Wales, West Midlands and Yorkshire & Humberside.

A profile of those completing the quantitative study can be found in appendix 1.

2.6. Acknowledgement of contributions

RbD would like to thank all who participated in each stage of the research (social media, depth interviews, focus groups, quantitative study and direct correspondence with RbD). We would also like to thank the Project Board (Carol Brooks, David Byrne, Bidy Fisher (Chair), Katie Fraser, Alan Fricker, Liz Jolly, Stephanie Kenna, Liz MacLachlan and Nigel Macartney (co-option)) for their guidance and the provision of reports from discussions conducted outside of RbD's contract. In addition, RbD would like to thank CILIP staff Dianne Butterworth, Desirée Chapman, Richard Hawkins, Bob McKee, Matthew Mezey, Penny Simmonds, Mark Taylor and John Woolley for their help and assistance.

RbD would also like to thank and acknowledge the following for submitting responses to the 'Defining our professional future' project:

- BIALL (informal response provided via David Byrne)
- Knowledge Council and Committee of Departmental Librarians

2.7. Analysis and reporting

This report provides the narrative for the findings from each of the stages of research conducted before the quantitative survey; desk research, social media, depth interviews and focus groups. It also provides the results from the quantitative survey, which are based on the total sample (all who completed the survey) as well as sub-groups, i.e. sector, membership status, length of time working in the knowledge and information domain, etc. where appropriate. Where a figure is shown in a green box this indicates it is significantly

higher than the figure amongst the total sample. Where it is in a pink box it is significantly lower.

By the very nature that surveys typically represent the views of a sample of the population, sampling error must be considered when evaluating the findings. This is measured by the confidence level and interval of the data. Most commonly, market research studies require a 95% confidence level, indicating that we can be 95% confident that we have not arrived at the estimate by chance.

The confidence interval shows the variation that may exist in the findings drawn from a sample. For example, the survey shows that 89% of those in the knowledge and information domain are experiencing increased pressure to provide a higher standard of service with a smaller budget. However, due to intrinsic characteristics of sampling, this will be surrounded by a confidence interval, in this case $\pm 1.1\%$. This indicates that the real figure, (the 'true' figure if the whole population were surveyed) lies somewhere between 87.9% and 90.1%.

The following table gives the confidence intervals for those findings that centre around 10% or 90%, 30% or 70% and 50% given varying sample sizes. (These assume a 95% confidence level using random sampling).

Confidence intervals for given results, based on a 95% confidence level)			
Size of sample	10% or 90% \pm	30% or 70% \pm	50% \pm
3300	1.0	1.6	1.7
3000	1.1	1.6	1.8
2500	1.2	1.8	2.0
2000	1.3	2.0	2.2
1500	1.5	2.3	2.5
1000	1.9	2.8	3.1

When comparing the results from different groups within a sample, say those working in the academic sector and the total sample, the difference in results are tested for statistical significance. This way we know whether the differences are 'real' or whether they could have occurred by chance. The test reflects the size of the samples, the percentage giving a certain answer and the degree of confidence chosen. Assuming a 95% confidence level, the differences between the results of two separate groups must be greater than the values given in the table below to be statistically significant.

Percentage difference required before the results may be considered statistically significant			
Size of sample	10% or 90% ±	30% or 70% ±	50% ±
3000 versus 700	2.6	3.9	4.2
3000 versus 500	3.0	4.4	4.8
3000 versus 200	4.7	6.8	7.2
3000 versus 100	6.8	9.5	10.0

Analyses of the findings in this report are based on all respondents less those who chose not to answer specific questions and those who stated 'don't know' or 'not applicable' to certain questions. The base (sample) size for each question is given in each chart. Where figures are not shown in the charts, these are 3% or less. Where figures do not sum to 100%, this is due to rounding. *% indicates less than 0.5%.

2.8. Definition of terms

Throughout the consultation there have been various terms given by participants to describe the stakeholder audience of the 'Defining our professional future' project'. Throughout this document RbD refers to the 'knowledge and information domain', as per CILIP's Business Requirements document for the project.

Section 3: Social media, desk research and formal qualitative consultation

This section considers the major industry issues identified in the pre-quantitative survey stages of the research. Sections 3.1 to 3.3 focus on the factors informing how the industry will develop over the next 10 years, and sections 3.4 and 3.5 outline views on professional membership organisations and attitudes to CILIP.

3.1. Finances and the recession

Finances are a major concern for those in the library and information domain, exacerbated by the recent election and recession. Without exception, all feel that the next few years will be a period of reduced budgets and added pressure to maintain high standards of services.

Within the public library sector in particular these financial challenges have been in evidence for some time. Several commented on the increased pressures facing librarians and library managers. Many professionals working within libraries mention shorter opening hours as a result of financial cuts; weekend and evening hours are particularly affected. However in the longer term, librarians do not feel that this is likely to persist; the use of self-service facilities and remote support make longer opening hours economically feasible. Indeed, some academic libraries are currently extending their hours, having the facilities unmanned (except for security staff).

Also affected by budget cuts is the number of qualified professionals. Increasingly managers are being recruited and expected to work as business rather than knowledge and information professionals. They therefore do not have, or necessarily recognise, the core traditional librarian / information professional skills. Within libraries, this means that not only are there fewer librarians but, particularly in the public sector, their skills are less common and consequently less recognised as crucial to the effective operation of a library facility.

Within the schools sector, there are concerns that school libraries will disappear and be replaced with content available through the VLE (virtual learning environment) and hard copy texts held and distributed by teaching staff. School librarians believe this poses a real threat to their core function, which is to acquire, organise and disseminate appropriate resources for learning needs. Another aspect of their role which is felt to be in jeopardy is the encouragement of students to develop a love of reading, a task often achieved through the introduction of pupils to fiction rather than curriculum based text.

Several in the knowledge and information domain also mention increased pressure to provide business cases to justify projects / expenditure. These business cases may involve justification of training or workshop sessions, but also they may be concerned with information resources. In the academic sector, professionals describe how almost all journals are now only available in their e-form unless a business case can be made to justify print versions. Typically these are likely to be for those journals with high levels of graphic content. In the public library sector too, reference books are increasingly being provided in E-form only, with little backlash from users.

A few commented that the recession should be a good thing for the knowledge and information domain, giving them the opportunities to redefine and re-evaluate the profession. However, interviewees commented that nobody seems to be promoting this opportunity.

“And if we as individuals and as a profession are to survive then we must do two things – demonstrate that we are worth more to the organisation if we exist than if we don’t, and look for ways to do that while spending less money.”

“I have worked in mainly commercial libraries and government libraries and I am finding that these are getting outsourced and closed including my current role.”

3.2. Professional structure, qualifications and culture

A fragmented profession

Virtually all of those interviewed comment that this is not an industry but a profession of librarians and information professionals. They argue there are too many differing sectors for it to be called an industry. Increasingly, sectors are fragmenting even further and hence it is difficult for any single membership body to adequately represent the needs and issues of all sectors of the profession. In addition, by far the largest sector of the industry is public libraries, not least because, it is argued, it has a billion pound annual budget and is more exposed and accountable than other sectors. It is also the most obvious manifestation of the profession. Given its relative importance, some interviewees feel that CILIP needs to stop apologising for libraries being so much of a focus, because it is neither expected nor realistic for it to give equal focus to all sectors in the knowledge and information domain.

“Can’t give equal bites of the cherry to all elements.” - Industry expert

“I believe in 2020 the sector will be just as fragmented as it is now. It’s inevitable that information management will take place in a range of different institutions: that there will be public and private organisations (and individuals) with different needs.”

Rather than trying to give equal priority to all sectors of the profession, it is argued that it would be better for CILIP to concentrate on what unites the profession, namely its ethical framework:

- The belief in empowerment through access to information
- The value of information in changing the community or commercial organisation
- The ethical belief in ‘social capital’

To achieve this goal of emphasis on a common ethical position, it is argued that CILIP needs to recognise that the increasing commoditisation of information is an inevitability which needs to be managed within the ethical framework. Increasingly, some forms of information have a commercial value and therefore require controlled or limited access, which could contradict the ethical framework of the profession. While these issues of sensitivity lie particularly in the commercial sectors of the profession, the free sharing of information

even between the academic and public library sectors remains a contentious issue and is subject to frequent and heated debate.

Professional skill sets and de-professionalisation

Skill sets are becoming increasingly diverse with numerous niche specialisms existing - such as archivists, conservators and paper specialists – and new ones developing in areas such as digitisation, metadata cataloguing and other IT-related areas.

However, it is often felt that the specialist skills are being overlooked and more generic skill bases are now considered valuable, resulting in a reduced demand for qualified librarians / information professionals and hence a de-professionalisation of the sector.

“It is sad today in schools they ask for no library qualifications. Here is the advert core: ‘a positive person to manage the general day to day running of the library’.”

In addition, users are increasingly able to find information using search engines, although many seem to be unaware that there is a need to evaluate sources of information found on the internet. Providing information literacy training is consequently a growing area for those in the knowledge and information domain and it is expected that this role will continue to evolve with staff becoming enablers, evaluating information sources and collecting data in accessible and usable formats. Consequently, the function of those in the knowledge and information domain is shifting from being able to find data to being able to help users evaluate it and distinguish between authoritative and non-authoritative information sources.

Moving away from the core librarian / information professional skill sets, there are two new skill areas that professionals feel they are increasingly moving into. One is the acquisition of appropriate ICT skills; the other is the increasing need for social and communication skills.

While it is accepted that those in the knowledge and information domain tend to embrace technological advances and hence are keeping abreast of new technological skills, not all show similar levels of awareness or interest in these new ICT developments. The degree to which they are able to keep up-to-date with new ICT skills depends on the type of organisation they work for. Those in larger organisations, such as in the higher education sector, have access to internal and external courses in addition to on the job training, mentoring and coaching. By contrast those working in smaller organisations or more isolated environments tend to take responsibility for their own development in this field. Hence the cost of courses can present a considerable barrier to training.

In addition to the technological advances, those in the knowledge and information domain are increasingly being called upon for their communication and social skills. Those in schools and HEIs frequently mention the calls on their time to provide educative workshops or courses to students and the public. This role is growing in importance within the HE sector because of the Widening Participation agenda which has resulted in increasing numbers of students who need additional literacy support. Consequently some feel that not only do

they need good communication skills, but in some cases teaching skills in order to operate effectively.

Many comment on the need to offer support to customers / clients / users, whether this is in the form of accessing required information, guidance in the use of the technology or providing advice to help users distinguish between authorised and informal sources of information. Within the academic environment this support has been formalised in many cases through the delivery of compulsory information literacy courses, often facilitated by library staff.

In addition to these two major areas of skills requirement, many commented on the need to have some commercial or generic business skills such as marketing and finance skills to better equip them in their role.

The value of Chartership

There is a shift away from the requirement for Chartership; many local authorities are now employing non-library professionals as library managers and choosing to have fewer qualified librarians within their teams. Some comment that this shift is a direct result of the introduction of career evaluation schemes which place little emphasis on professional qualifications, prioritising competences over these. Within the academic sector, Chartership is also often no longer a job requirement, and consequently there were several comments from those within this sector that they feel CILIP is less relevant to them than to some others. Those working in the commercial sector are even less likely to feel that Chartership is meaningful to them or their employers.

“It should be crystal clear to people why they should want to be chartered and employers as to why they should hire chartered staff.”

Many comment that the Chartership process is not considered particularly challenging, and complain that continued Chartership is contingent purely upon CILIP membership. Several mention that they would expect CPD to be necessary to maintain Chartership. Some comment that CILIP’s Framework of Qualifications and Accreditation has not lived up to their expectations and consequently does not really meet their needs.

“Qualifications don’t necessarily equal skills, and both should be recognised whether separately or together.”

There are however those who defend Chartership:

“I consider the phrase ‘Chartership just proves you can write a cheque’ to be a shallow and jaundiced view of a badge of competence that many information professionals strive for a long time to achieve.”

“Chartership is the gold seal of development for information professionals.”

Librarian or Information specialist?

In terms of nomenclature there are mixed opinions regarding the term 'librarian'. Most claim that it has negative or misleading associations amongst the public, and often amongst non-professional librarians within the profession.

However, most librarians are happy to be called 'librarians'. They feel this is a term that the public recognises even if they are unaware of the difference between a qualified and an unqualified librarian. While alternative job titles were mentioned, the difficulty with these titles is that they mean nothing to those working outside the knowledge and information domain. Therefore, respondents generally feel that the label for the job is less important than raising the profile of what the profession entails, which is regarded as the task of the professional association.

"Librarians are at the interface between the organisation of knowledge and unimpeded public access, it's not especially to do with books." – Industry expert

In addition several commented that the HE sector is showing signs of returning to the building name of 'library' rather than 'information or resource centres'.

Those working in commercial sector are more likely to describe themselves as 'knowledge managers' rather than 'librarians'. They see their role as increasing the knowledge base and expertise within their organisation, in addition to improving internal processes and best practice to gain competitive advantage. It is argued that this sector regards its information professionals higher than others because of this integration of information skills with business activities.

3.3 Technological developments

Impact of Web 2.0 on learning and communication styles

The development of the internet is absolutely intertwined with the knowledge and information domain, both for its content holding role and the interrogation and communication of that content.

Currently information literacy levels of customers and end users are seen to be low, with the most ubiquitous search engines such as Google and Yahoo used without any consideration for the validity of the source. Within the academic context, learning styles are changing along with teaching methodologies; students are much more familiar with blended learning approaches and will tend to reach for the mouse before a text book.

Web 2.0 tools such as Facebook are increasingly used for both communication and content (for example, even the Bank of England tweets the rate of interest). This merging of informal communication tools with formal or authorised content renders information evaluation even more difficult for users. This is an area where those in the knowledge and information domain can excel in their advice. However, it is argued that many employers (particularly in public libraries) do not permit access to social media sites, often because the organisations responsible for the library are unaware of the value of the tool. There are arguments that lobbying employers on this issue is a role for a professional membership organisation.

Library as a physical and virtual space

Continued technological advances raise the question as to whether libraries need to continue as physical entities for access to content. However, most feel that at least for the next two decades there will be continued need for a physical location, not least because increasingly libraries are regarded as social spaces with both quiet and social areas to suit varying uses. That said, there are expectations of a continued evolvment into virtual spaces where users download e-books, films and information without ever needing to visit the physical location, even if this involves using a Spotify or Audacity type subscription.

In terms of what is currently stocked in a physical library, the following changes are expected over the next 10 years:

- DVDs and CDs - it is expected that these will be replaced in the next 10 to 15 years with their downloadable equivalents as fibre optic cabling increases the throughput speed of data.
- Non-fiction books – it is thought these will become rarer, although there is some debate over how quickly this will occur for some texts (such as graphic novels). In many cases reference works are already available only in e-form in public and academic libraries.
- Journals - these are likely to be available only in e-form within the next decade, with the possible exception of art journals where there is a high degree of graphical content.
- Fiction books - it is argued that they have a longer potential life in print than non-fiction, partly because of their portability but also because of the sentimental value of the physical artefact. However the rate at which e-book reader adoption grows will be a significant factor here.
- Rare and original works - as physical artefacts these books are likely to grow as specialist collections (possibly attracting interest as museum pieces).
- Social media tools – these are expected to become more prevalent and sophisticated and, combined with Web 3.0 applications, will play an increasingly important role.

The problems of open access versus commerciality

There is seen to be a potential threat to the commercial world, for example Amazon and Google Books, as libraries are permitted to offer free access to e-books and media. While currently libraries are only permitted to lend a maximum of three copies of an e-book and these self erase after 2 to 3 weeks, it is argued that as library budgets are squeezed, there will be more of a decisive move further towards electronic books.

This presents an interesting dilemma. Will the commercial organisations win over the publishers and limit library access to publications? Will libraries need to start a subscription service like Spotify to enable e-book access? Will publishers and authors choose where to stock the books? Until now, publishers have held the power over who stocks their books, but now, authors can self-publish. This could threaten the power of the publisher, the traditional arbiter of quality. On the other hand, commercial organisations such as Amazon

with their reader reviews are extremely powerful and influential in developing online reputations and fan bases. Professionals have no clear or common view on how this situation is likely to develop, but recognise that could have widespread impact in the coming years.

Many participants have noted the irony that with digitisation, access has become more limited rather than less so. When information was only in book form, access was free to anyone visiting a library. However, payment is now increasingly required for digitised sources. Furthermore, public libraries are seen to have access to less information as academic texts move into digital form, tending only to be available to those within HEIs.

Copyright legislation

Copyright has grown increasingly complex with the proliferation of formats, a trend that is seen as not particularly helpful to the ethos of those in the library and information domain (which is historically about the free access to information).

Costs of e-resources are rising, national newspapers are starting to charge for access to their online information, and other sources of information are having their access restricted despite digitisation due to copyright legislation.

It is argued that the trend to date has been for massively powerful commercial organisations to favour copyright, creating an oppressive regime with few voices arguing for the rights of the humble information user. Those in the knowledge and information domain believe that this is a role a professional membership organisation should be playing, although they accept that this needs to be in collaboration with other organisations and stakeholders.

Technological creep

Given the rate at which technology has developed over the last decade, it is generally expected that new generations of technologies will emerge at a similar rate over the coming decade. Hence to a certain extent, there is a degree of guesswork involved in predicting future changes. A range of technological developments that have surfaced are listed below:

- Storage capacities will increase to accommodate growing quantities of digital data. Cost effective means of storage will be found and therefore storage charges are expected to fall.
- As networks increase in speed due to the growth of super broadband (fibre-based networks) more efficient downloading of high-volume data such as sound and film will be possible although there is still likely to be a technological divide as this will not be affordable to all sectors of the population within ten years.
- By 2020 access to the internet will be as common as TV ownership. Further, with the increasing functionality and ownership of mobile devices with continuous internet linkage, more users will access information on the move.

- Other methods for interfacing with technology will develop such as touch, sight and voice; these are likely to replace the mouse and keyboard.
- E-books will continue to grow in popularity and devices will develop to allow their use, e.g. i-pad, and electronic ink and paper.
- Open source software will continue to grow possibly supplanting proprietary software.
- Cloud computing (reliance on external remote devices for the supply of resources, software, information and associated data) may well grow, although not without associated risks. Financial pressures may force its acceptance in many public sectors.
- Web 2.0 will continue to evolve to more sophisticated ways of generating and sharing data (i.e. user-generated content, social networking and the combining of different data and technology to create new services).
- Web 3.0 (the semantic web, i.e. ability of programs to understand not just signifiers but the underlying meaning behind those signifiers, and for computers to talk to one another without human intervention) may come to fruition. This will be helpful as datasets increasingly contain both 'dirty' and clean data. It will also help with more sophisticated means of interrogation and data retrieval.
- Metadata will be extracted automatically from digital objects. Currently this metadata is held in 'deep web' and thus is not publically available. In the future it is expected that this metadata will be available at surface level allowing broader visibility and access through search engines or aggregated collections. This is particularly likely if HEIs and other institutions collaborate to aggregate collections.
- A few centres of excellence will emerge for the preservation and pooling of data providing a chargeable service across many sectors.

"Perhaps the library will have a role to play in aggregating, explaining and training on all these new technologies?"

"In the age of technology where everything is turning electronic including books, journals, databases I fear that the profession is going to disappear if we are not careful."

"The digital world is simply our time as we know it. Now, more than ever, focussing on business need (whether commercially or within public service) and customer care has never been more crucial."

As emerging technologies develop, the socially disadvantaged are likely to continue to lack the latest technologies and hence there will still be a need for libraries to provide these facilities. However, with the expected financial restrictions, libraries may well lack the funding to afford the latest technological developments.

3.4 What is required from a professional association?

Those in the knowledge and information domain perceive the need for the association representing their profession to shift from being reactive to proactive. They also believe there is a strong need (and a current gap) in campaigning for the issues affecting the domain and its end-users. A body is needed to campaign and lobby for the rights of users in the battle against the copyright giants. Furthermore, a gap exists for an organisation to promote the case for the 'social capital model'.

When considering personal benefits, members and non-members frequently mention the need for a body to represent them in their workplace. Several mention a trade union style role, where the professional associate can intercede on behalf of members, raising their profile and explaining the benefits of the profession and the support required by those in the knowledge and information domain from their employers. This role is becoming increasingly necessary as library / information / knowledge management teams become smaller and more diverse. As the number of qualified staff reduces, many feel isolated in their work environment, often being the only knowledge / information professional in a large team or organisation.

There is a need for professional associations to act as an exemplar or role model to the industry and especially to employers. An example of the type of behaviour desired was repeatedly mentioned with regard to lobbying for members to have access to Facebook and YouTube in their work location. It seems that certain employers (particularly in the public and health sectors) routinely block access to these sites without realising the impact on the legitimate uses those in the knowledge and information domain have for these sites.

To last in the long term, it is argued that a professional organisation representing those in the knowledge and information domain needs to support its members by promoting their skills and benefits to employers and lobbying to ensure that the rights of users are heard and balanced in the commercial battles over copyright.

3.5 CILIP

Reasons for current CILIP membership

Members generally struggle to immediately identify the core benefits that their CILIP membership affords. People often join at an early stage in their career and then stay due to inertia. Many justify their continued subscription by arguing that, although the benefits of membership are limited, they believe in the profession, and the ethical framework that CILIP embodies.

In terms of membership giving the impression of being part of a community, this is not evident in the consultation. While those in the knowledge and information domain have a variety of ways that they keep in touch with colleagues – many of them using online resources – many feel that these professional networks are created independently, not via CILIP membership.

Some have found the professional qualifications and networking opportunities accessible through CILIP membership to have been useful in their early careers. However, as they have

become more senior and experienced, they have needed more strategic, higher level guidance and support from CILIP, which has been limited.

It is argued that any benefits of membership are focussed around involvement with their branch and special interest groups, with personal development being realised through volunteering for various committees. However, several mention that volunteers are asked to give considerable chunks of time and that they do not feel appreciated for their voluntary contribution.

Several mention the prohibitive cost of CILIP conferences and training sessions. They claim that, whilst larger organisations have tended to pay for these in the past, the current recession is affecting training and event budgets. Smaller organisations do not tend to fund attendance at these events, and individuals find the courses too expensive. Some explain that other professional associations provide free or significantly lower priced conferences and events, and hence these can be more attractive.

“I believe that this issue is so important to CILIP's future that it needs to conduct some proper research. Find out how CILIP compares to other professional bodies in terms of cost and value and be open with the results.”

How is CILIP currently regarded?

CILIP is generally not highly regarded by those consulted in the knowledge and information domain. It is seen as too formal, with too much infrastructure and an unfocussed approach to its purpose. It is not considered customer-focussed, even though it is often described as a membership services organisation. Many feel it offers little benefit to them personally.

“CILIP feels distant, remote and irrelevant to many - particularly those working in business, schools and health libraries – it seems like Update and Gazette have little that reflects our working lives.”

“I'm very pro-CILIP but they have the wrong mentality.” – Industry expert

“CILIP works along traditional channels and keeps its goals within a 'safe' and rather traditional world – the 'white middle class male' area of the sector.”

Several mention CILIP's cost base is very high, and believe that this has been the main factor in CILIP's decision to focus on commerciality, citing high course and event fees as unpopular examples of income generation strategies.

“They see themselves as a profit company not a professional body.” – Industry expert

“Their priority should be supporting members not how to make a profit.” – Industry expert

“Streamline, employ less people and downsize in interest groups, regional groups and activity.”

In addition the courses CILIP provides are seen to focus on the provision of traditional skills rather than encompassing some of the competences which those in the knowledge and information domain feel would help them promote the value of their profession within their sector. In-house training is often regarded as more relevant than what is seen as CILIP's expensive, predictable, old fashioned courses.

"At present its courses are predictable, not challenging and are most notable for providing a good lunch." Industry expert

Most mention that CILIP is very London centric which is regarded as a negative attribute. Many express a preference for courses to be spread across the regions to reduce the associated costs of travel.

"CILIP needs to lose the expensive central London digs and become a virtual organisation. Employees could work from home, with meeting space rented only when needed, or perhaps downsized to a small core office elsewhere (Birmingham?)."

"If the special interest groups can deliver these excellent training opportunities so affordably, why can't CILIP centrally do it for less than a few hundred pounds?"

Out of touch with Web 2.0 culture

CILIP is perceived to be 5 to 10 years out of date in its view of the internet and how it is used. It still relies on newsletters and websites to communicate, tools that are seen as less important than a few years ago. Therefore CILIP appears to be choosing not to engage in the very active and lively online debates being conducted through social media and blogs in numerous locations on the web.

CILIP Website

CILIP's website is also seen as quite out of the touch, with poor search facilities particularly in the 'Chartership' section of the website.

"Many information professionals apply their expertise to website design, usability, information architecture and so on – the best principles of all these should be demonstrated by CILIP's site."

"I don't think it's unreasonable to expect that the professional body for library and information professionals would have a decent website that is easily navigable and works as it's supposed to."

Organisation name

There are also negative comments regarding the name CILIP itself:

"I think changing the name from Library Association to CILIP was catastrophic: lots of people outside the profession knew the Library Association and its name is fairly self-explanatory; I don't think the same could be said of CILIP".

“So as part of the deliberations on the future of CILIP, I’d like to see some serious work given to naming and branding (which are not the same thing), both for CILIP and its constituent parts, especially if, as I hope, we merge with some smaller allied groups”.

What does CILIP need to become?

Throughout the pre-quantitative stages of consultation, it is consistently argued that CILIP needs to become more proactive and responsive, serving as an advocate for:

- The profession, the value of the knowledge and information domain
- Its members and the general population of the knowledge and information domain, providing support and giving a voice to those working within it

This means that CILIP needs to shift from being primarily a membership services organisation (as it is currently regarded) to more of a campaigning body, focussing on:

- Thought leadership
- Lobbying
- PR
- Utilisation of research evidence

“Being the voice of the profession is where it matters.” – Industry expert

“CILIP needs to be an integral part of every librarian’s day to day work. I would like to see a situation where CILIP acts more as an aggregator of data.”

Key areas that need to be influenced are:

- Government policy regarding the role and funding of libraries.

“I don’t want to hear an item about library closures on the news without a CILIP spokesman fighting our corner.”

- Academic institutions to encourage a more collaborative approach to the sharing and access to resources currently only available within the HEIs themselves.
- Schools and the education sector to more formally include the role of the library within the pedagogical framework of schools.
- Local authorities to ensure that the value of libraries as the heart of the community is valued, protected and adequately resourced.
- Commerce, both with regards to potential partnerships and aggregation of commoditised information sources.
- Legislative bodies, balancing copyright against freedom of expression and equality of access.

- Prisons to support controlled access to the internet for staff and inmates.
- Use of Web 2.0 type tools and social media within the libraries sector.

Whilst those in the knowledge and information domain uniformly agree that the priority for CILIP should be as a lobbying body for the profession and its users, most feel that there should also be support for the individual members. Types of support frequently mentioned include:

- The provision of an archive of new resources and tools with an independent evaluation in the style of the American Library Association's Jenny Levine, or 'Which Magazine'. This would require the adoption of a more experimental approach to trying and testing products, software, blogs and equipment. Currently it is recognised that CILIP approved suppliers pay to be on the list, which is not what those in the knowledge and information domain expect 'approved' to mean. For them, CILIP should be providing member / independent assessment of suppliers and their products.
- Shared information using current technology.

"In so many circles, print is dead in terms of giving current, useful information in short bursts. So go e-only, and cut costs and fees in doing so."

- Acting as a role model, illustrating how those in the knowledge and information domain can improve their working through embracing Web 2.0 and Web 3.0 technologies. This would entail shifting away from the old school approach of trying to control every debate, and moving towards the social media approach of encouraging debates to occur wherever they are appropriate.

"I want CILIP to be an enabler. Networking is vital for professionals and CILIP should be actively working to help members to do just that...My private profile should be richer to allow better linking. We should have LinkedIn style tools through these systems. These should be open to linking to other systems to allow those outside CILIP to interact with our networks."

"I want to be able to come to CILIP and be entertained, enthralled and excited by the equipment that's available, and to have the opportunity to try out new things there and then."

"CILIP still adheres to the theory of: got to get it right – a place for every book and every book in its place." – Industry expert

"Last year CILIP said they don't use blogs and that all debates should be conducted on the CILIP website to be valid." – Industry expert

After the desk research and formal qualitative stages were completed and written up with the ongoing findings from the social media commentary, a review of learning with the CILIP project board was undertaken. This consolidated all of the learning identified thus far and identified which elements needed to be investigated further in the quantitative stage of the project.

The following sections (4-11) analyse the results of the quantitative survey completed by 3286 members of the knowledge and information domain.

Section 4: Working environment

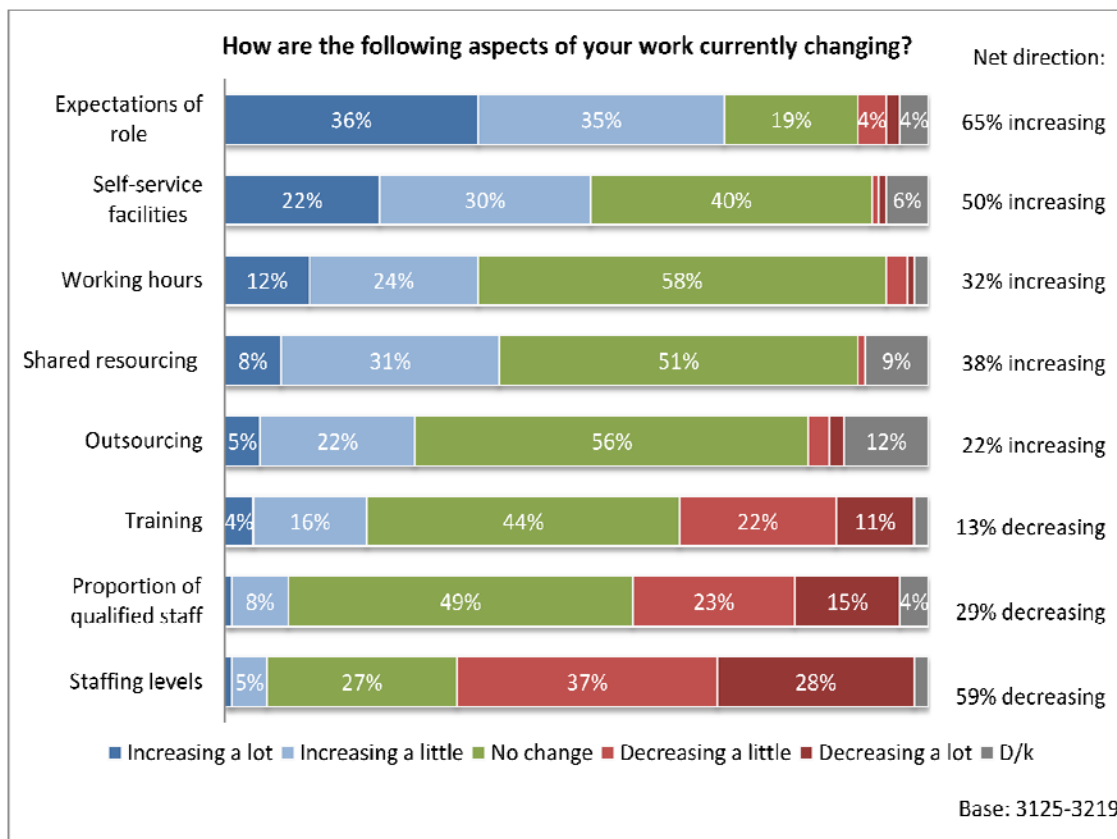
4.1 The changing workplace

Q1. How are the following aspects of your work currently changing?

Those in the knowledge and information domain are experiencing increased demands being placed upon them, coupled with a rise in the self-service/unstaffed facilities and a general fall in staffing levels.

Seven in ten claim to be seeing an increase in the expectations being placed upon their role; for 36% this has resulted in their working hours increasing. Almost two-thirds of professionals claim staffing levels have decreased, and 38% declare the proportion of qualified staff has fallen. For a third the provision of training has decreased; a fifth claim it has increased.

Over half claim to have seen an increase in the availability of self-service / unstaffed facilities, with just under 40% declaring an increase in shared resourcing (with other libraries / institutions). Just over a quarter identify an increase in outsourcing.



Net direction is calculated by adding the % saying increasing a lot or increasing a little, and subtracting the % saying decreasing a lot or decreasing a little.

The most hit appear to be those in the public sector.

Compared to the total sample, a significantly higher proportion of those in the listed sectors are experiencing an increase in the following:

- Public/local government: expectations of their role; self-service / unstaffed facilities; outsourcing; shared resourcing
- Academic: self-service / unstaffed facilities; outsourcing
- Health: shared resourcing

Compared to the total sample, a significantly higher proportion of those in the listed sectors are experiencing a decrease in the following:

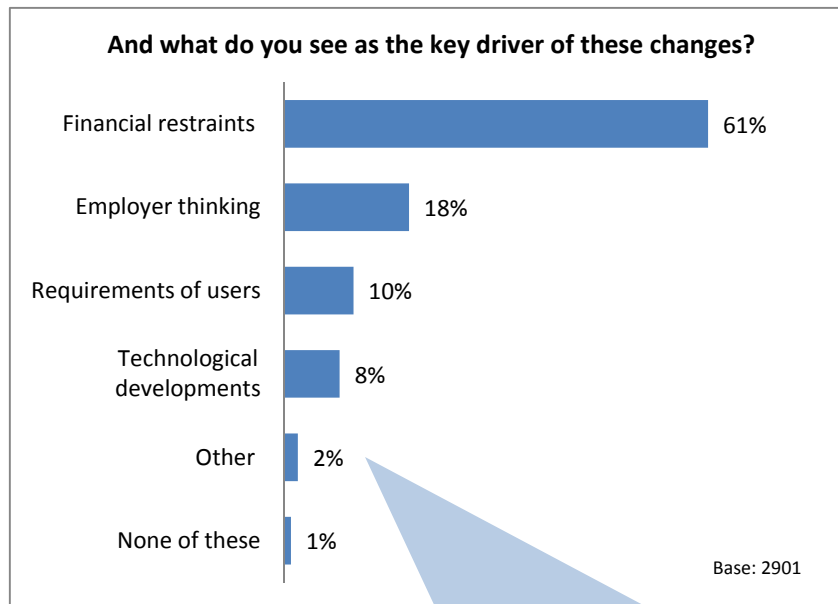
- Public/local government: proportion of qualified staff; staffing levels
- Academic: staffing levels
- Government: staffing levels

Additionally, the working environment is recognised to be changing by those who have worked in the knowledge and information domain for 11+ years. Significantly more of this group believe working hours are increasing, while more of those 21+ years experience feel that the proportion of qualified staff is decreasing.

4.2 Reason for change

Q2. And what do you see as the key driver of these changes?

The large majority of those in the knowledge and information domain argue that financial restraints are the key driver of the changes they are currently experiencing in the workplace, 61% state this. Just under a fifth cite employer thinking, 10% the requirements of users and 8% technological developments.



"For public libraries the current political agenda and sound bites about community ownership, social enterprise governance arrangements and indeed changes in usage of services etc is having a huge impact."

"I think that there is a constant drive to downgrade staff qualifications/or not give due credit for qualifications and experience so that staffing can be acquired cheaper. The staff that are in place are expected to take on more demanding roles, heavier workloads with less resource and no additional staffing."

"Well, it is requirements of customers/users, but really it comes - in a school library setting - from the librarian as a key driver."

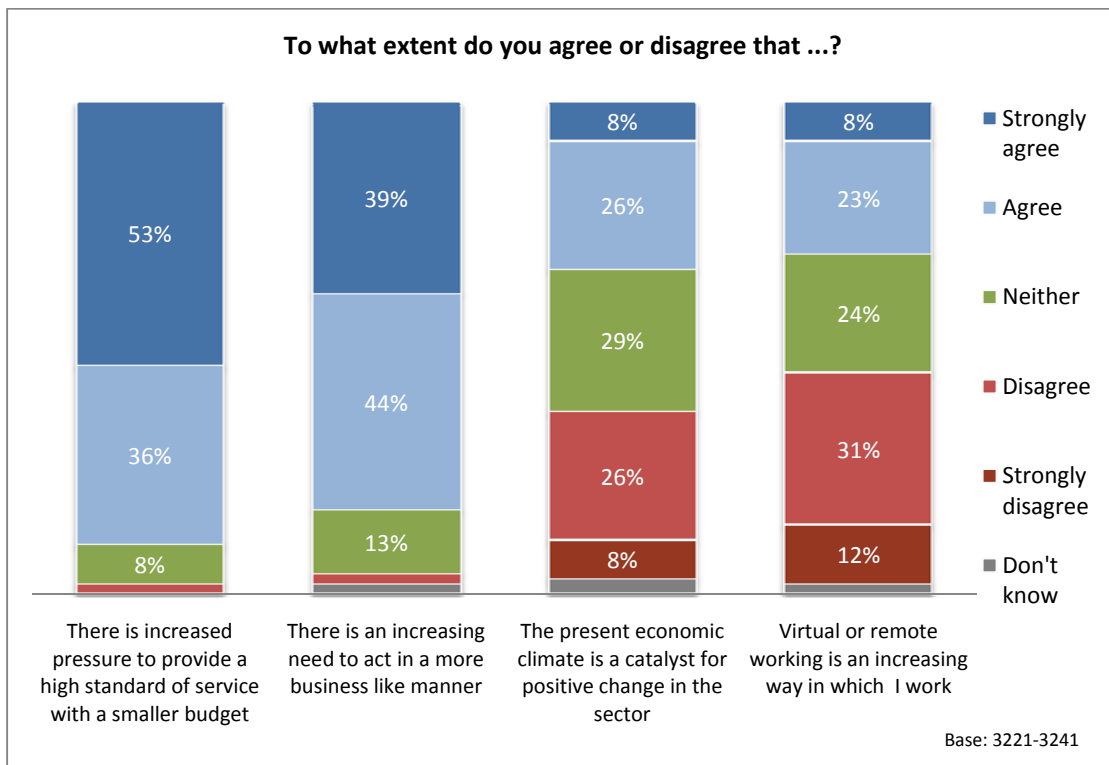
"The financial constraints are likely to be the main cause of changes, but I think my employer is trying too hard to be the best at what it does and is not considering how the changes are affecting staff. They are bringing in new technology, but some of this is at such a cost that other things have to be cut."

A significantly greater proportion of those working in government and public / local government cite financial restraints (72%) compared to the total sample.

Q3. To what extent do you agree or disagree with each of the following statements?

Nine in ten claim to be under increased pressure to provide a higher standard of service with a smaller budget, whilst 83% argue they are increasingly required to act in a more businesslike manner.

Views are mixed as to whether the economic downturn has been a catalyst for positive change in the sector. Whilst 34% agree it has, the same proportion disagree and 29% are undecided. 31% are utilising remote working more frequently, but the majority (43%) are not.



“Efficiency savings and cuts mean that less people have to do more. None of us want to compromise on quality or standard of service, so people will work harder to make sure that service delivery is not compromised.”

“With the current economic climate, there are ever-decreasing budgets but this (a) does not change the needs of the customers and their expectations and (b) take into consideration the ever increasing cost of technology and (at the very lowest level) books/information! Also Libraries are not seen as being as important as other areas of the work place and so there is little respect or understanding of the work that we do and its role in society.”

“We are required to be accountable for the expenditure of public money. Embedding business skills to service management and development is one benefit of the current changes. We are now required to prepare detailed business cases for all new work or service changes. We are also required to have advanced project management skills - as these are being applied in all areas of the "business". Project management protocols are being applied to all our work areas.”

Compared to the total sample, a significantly higher proportion of those in the listed sectors agree with the following statements:

- Public/local government: increased pressure to provide a high standard of service with a smaller budget; increasing need to act in a more businesslike manner
- Health: increasing need to act in a more businesslike manner; working increasingly virtually/remotely
- Government: increasing need to act in a more businesslike manner
- Commercial / industrial / legal sectors: the present economic climate is a catalyst for positive change

Significantly fewer of those in the school sector agree with all four statements.

4.3 The workplace in ten years time

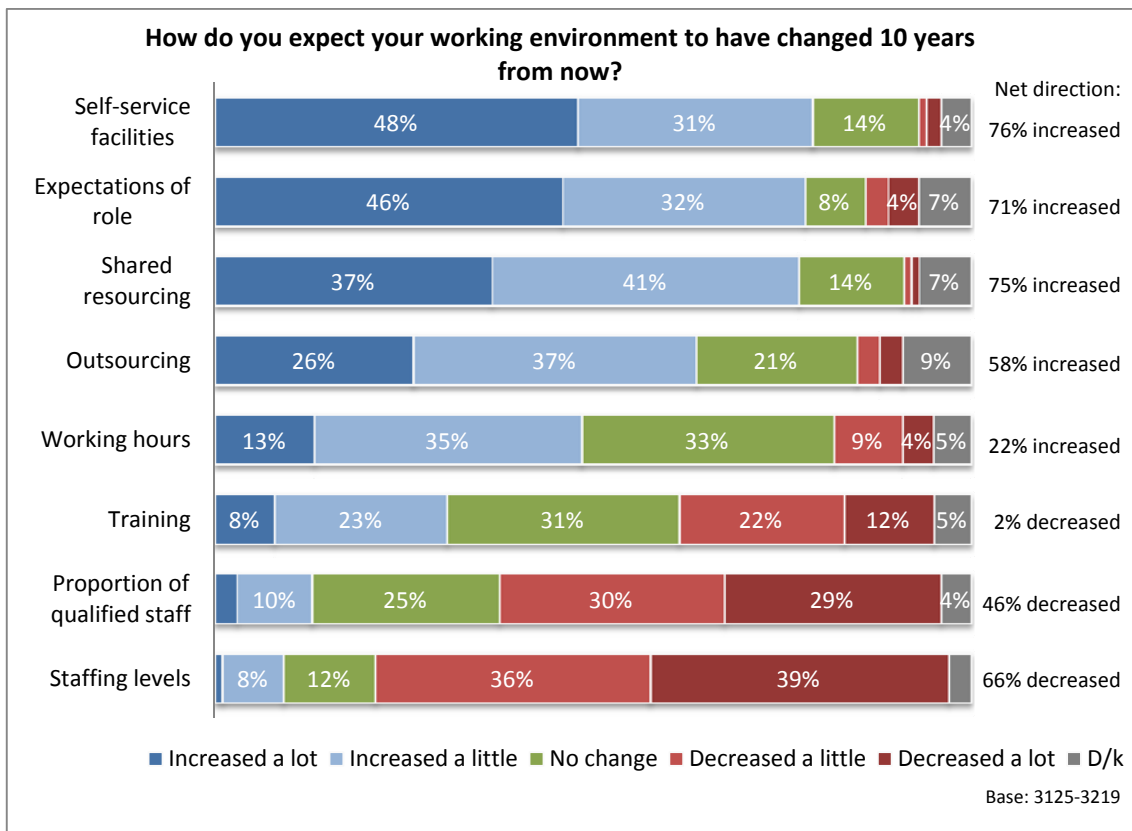
Q10. How do you expect your working environment to have changed 10 years from now? (Please answer even if you expect to be retired or not working in 10 years.)

Those in the knowledge and information domain expect their working environment to evolve significantly in the next 10 years, heavily impacted by the likely reduction in staffing levels.

Four in five predict a continuing rise in self-service facilities and consequentially, three-quarters expect staffing levels to decrease; 39% expect these to decrease a lot. Further, unsurprisingly, the proportion of qualified staff is also expected to decline; 59% state this.

For 78%, shared resourcing is likely to become much more commonplace, whilst 63% expect outsourcing to increase; again, influencing the perception of a decrease in staffing levels over the course of the next 10 years.

In line with current experiences, almost four in five believe there will be a continued rise in the expectations placed upon their role and, as a result, almost half anticipate their working hours will increase. Despite this, 33% expect training to decrease; 31% anticipate it will increase.



Compared to the total sample, a significantly higher proportion of those in the listed sectors expect the following to increase in the next 10 years:

- Public/local government: self-service facilities, outsourcing and shared resourcing
- Health: training
- Academic: training; self-service facilities, outsourcing; shared resourcing; working hours; expectations of role
- Commercial / industrial / legal: training

Compared to the total sample, a significantly higher proportion of those in the listed sectors expect the following to decrease in the next 10 years:

- Public/local government: training; proportion of qualified staff; staffing levels
- Government: training; staffing levels
- Academic: staffing levels

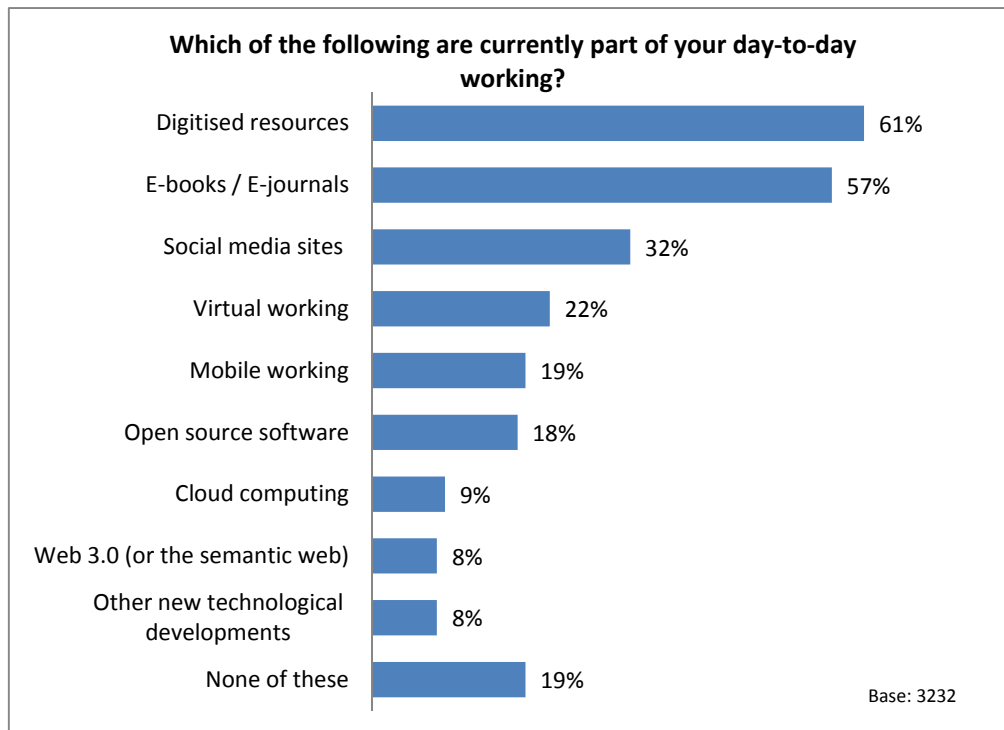
A higher proportion of the more experienced professionals (those working in the knowledge and information domain for more than 21 years) believe that general staffing levels and the proportion of qualified staff will decrease, compared to the total sample.

Section 5: Technological developments and your work

5.1 Technology in use today

Q11. Which of the following are currently part of your day-to-day working?

The vast majority (81%) are engaging with new technologies as part of their day-to-day working. Over six in ten utilise digitised resources and 57% use E-books and E-journals. About a third use social media sites, 22% virtual working, 19% mobile working and 18% open source software.



Those working in the academic sectors are very clearly leading the way in respect of the proportions using the various technologies and the breadth of technologies being used. Compared to the total sample, a significantly higher proportion of those in the following sectors use the listed technologies:

- Academic: digitised resources; E-books and E-journals; social media sites, open source software and cloud computing
- National sectors: digitised resources
- Health sectors: E-books and E-journals; virtual working
- Industrial/commercial/legal sectors: virtual working; mobile working; web 3.0 (or the semantic web)

- Public/local authority: mobile working

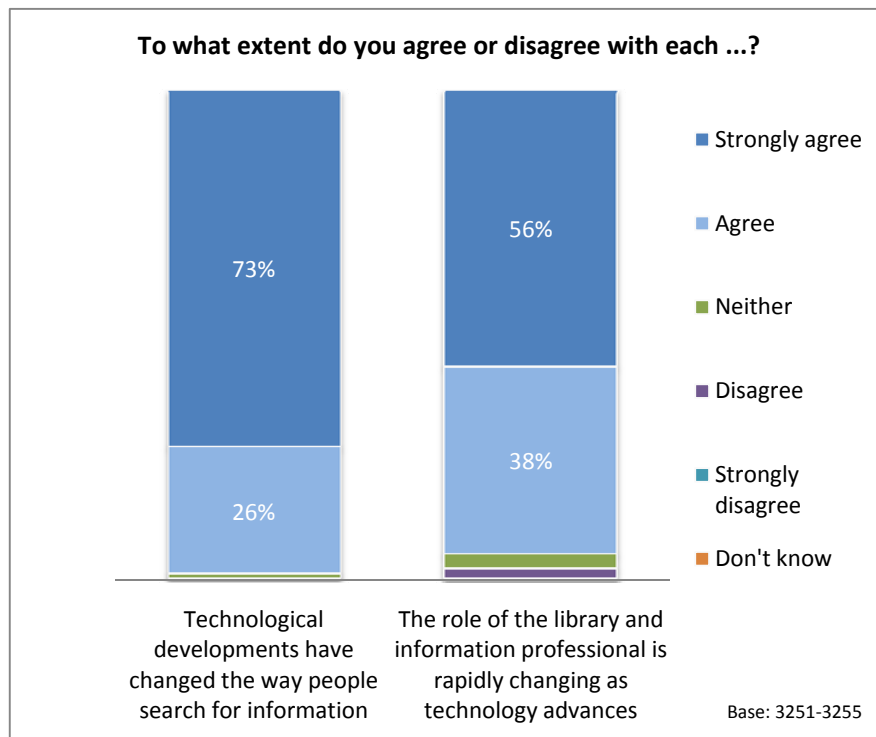
Mentions of technology by those working in the public/local authority sector and schools are most notable by their limited mentions or omissions. 30% and 37% respectively suggest that none of the listed technologies are currently part of their day-to-day working.

A significantly higher proportion of those working in the domain for 21+ years claim to be working virtually. However, significantly fewer working in the domain for 21+ years are using E-books/E-journals and social media sites.

5.2 The impact of technology

Q12. To what extent do you agree or disagree with each of the following statements?

Almost all agree that technological developments have changed the way people search for information and that their role is rapidly changing as technology advances. Three-quarters strongly agree with this former statement, and nobody disagrees. As technology advances, 94% agree that the role of the library and information professional is rapidly changing, just 2% disagree.



“In the children's field it is noticeable that we do not have the kind of requests for information for homework which we had 10 years ago - children now feel able to search the web. Whether they can do this successfully is debateable, but their perception is that they have information at their fingertips.”

“Things like Google and Wikipedia have made it easier to find information, and people naturally expect all finding mechanisms (including library catalogues and academic databases) to be as easy. People are also able to find information from anywhere using mobile devices.”

“Years ago we were the gatekeepers, then we became the enablers of end user access and now we need to change again to embed a professional approach to information in our organisations.”

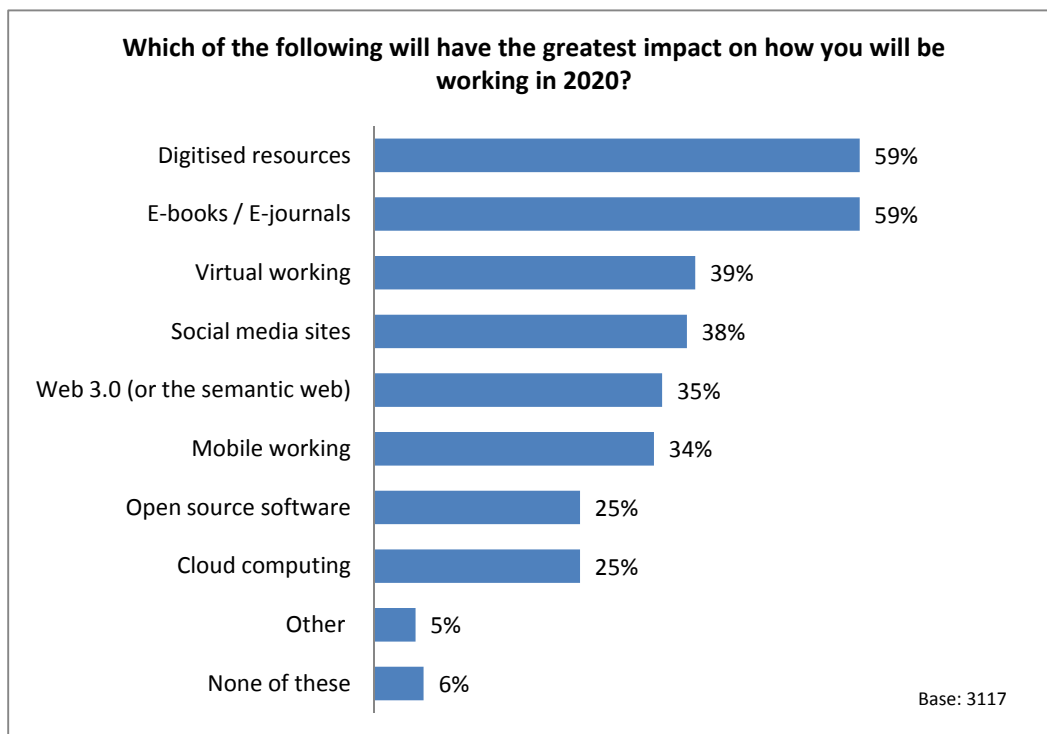
“To keep up with rapid changes the information professional has to be flexible and responsive as a manager of knowledge, they must be a polymath capable of constantly learning new things and an educator to teach other people to use new systems.”

5.3 Technology in 2020

Q17. And which of the following do you expect to have the greatest impact on how you will be working in 2020? (Again, please answer even if you expect to be retired or not working in 10 years.)

Those in the knowledge and information domain expect the two technologies that many are already using on a day-to-day basis to be having the greatest impact on how they will be working in 2020; namely digitised resources and e-books/ e-journals, 59% claim this.

Around four in ten claim virtual working and social media sites will have the greatest impact, 35% web 3.0, 34% mobile working and a quarter open source software and cloud computing.



Compared to the total sample, a significantly higher proportion of those in the following sectors expect the listed technologies to have the greatest impact in 2020:

- Academic: web 3.0, open source software; cloud computing; mobile working
- National sectors: digitised resources
- Health sectors: virtual working; mobile working
- Public/local government: E-books and E-journals; social media sites
- School: e-books and e-journals
- Government: mobile working

Section 6: Professional role and skills

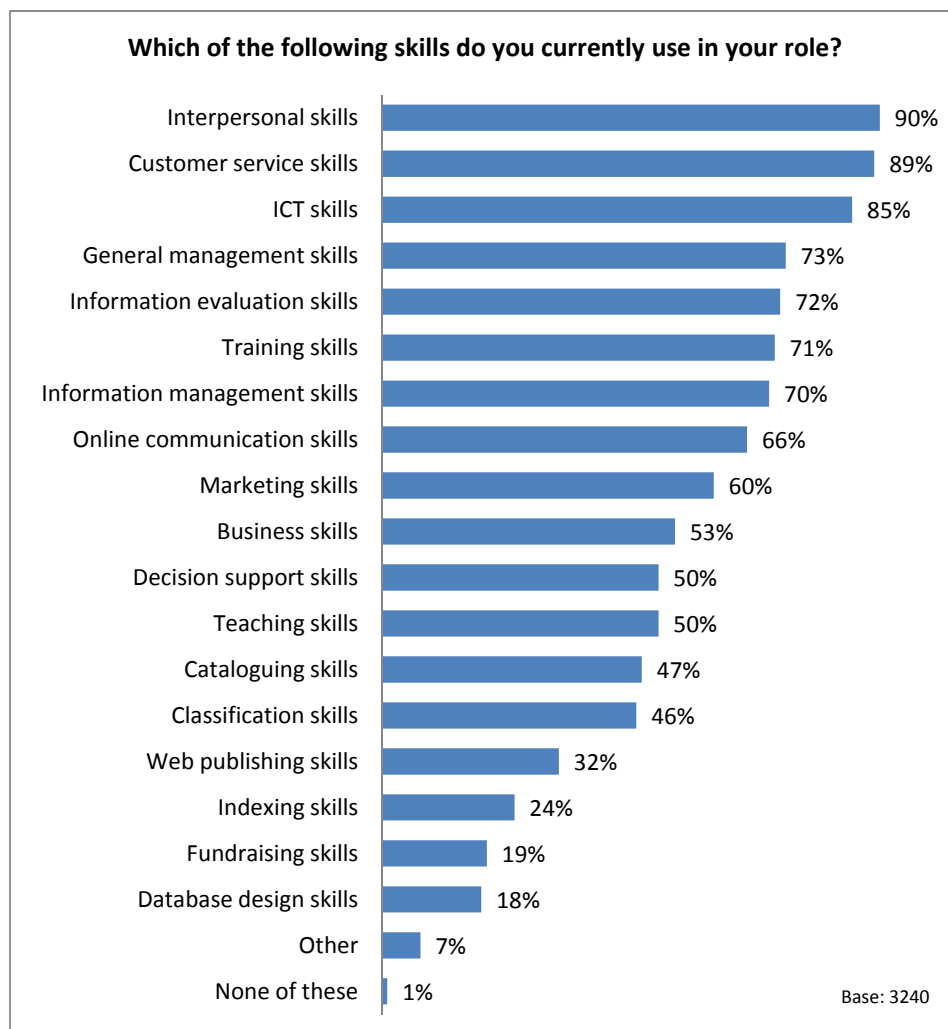
6.1 Skills

Q19. Which of the following skills do you currently use in your role?

Those working in the knowledge and information domain are employing a wide variety of skills in their current role. From a given list, survey participants have selected on average 11 skill areas / disciplines.

85% or more are using interpersonal, customer service and ICT skills. Around seven in ten profess to use general management, information evaluation, training and information management skills, while two-thirds use online communication skills.

Six in ten make use of marketing skills in their role, and around half use business skills, decision support skills and teaching skills. The more 'traditional' librarianship skills are used by a smaller proportion; cataloguing and classification skills are employed by just under half of those completing this survey, and indexing skills are used by a quarter.



Across the sectors, those working in the school sector select the most skills, at 13. Those in the government select the least number of skills; however this is still a sizeable amount at 9. The top three skills (interpersonal, customer service, ICT) hold true across all the sectors except industrial/commercial/legal, where a higher proportion use information management and evaluation skills than ICT skills.

Compared to the total sample, a significantly higher proportion of those in the following sectors use the listed skills:

- Academic: interpersonal, online communication, teaching and web publishing skills
- Government: business skills
- Health: information management, marketing, cataloguing, classification, web publishing, indexing and database design skills
- Industrial/commercial/legal: general management, information evaluation, training, information management, business, classification, web publishing, indexing and database design skills
- National: cataloguing and indexing skills
- Public/local government: ICT, general management, training, marketing, decision support and fundraising skills.
- School: interpersonal, customer service, ICT, general management, information evaluation, information management, teaching, cataloguing, classification, indexing, fundraising, database design and marketing skills

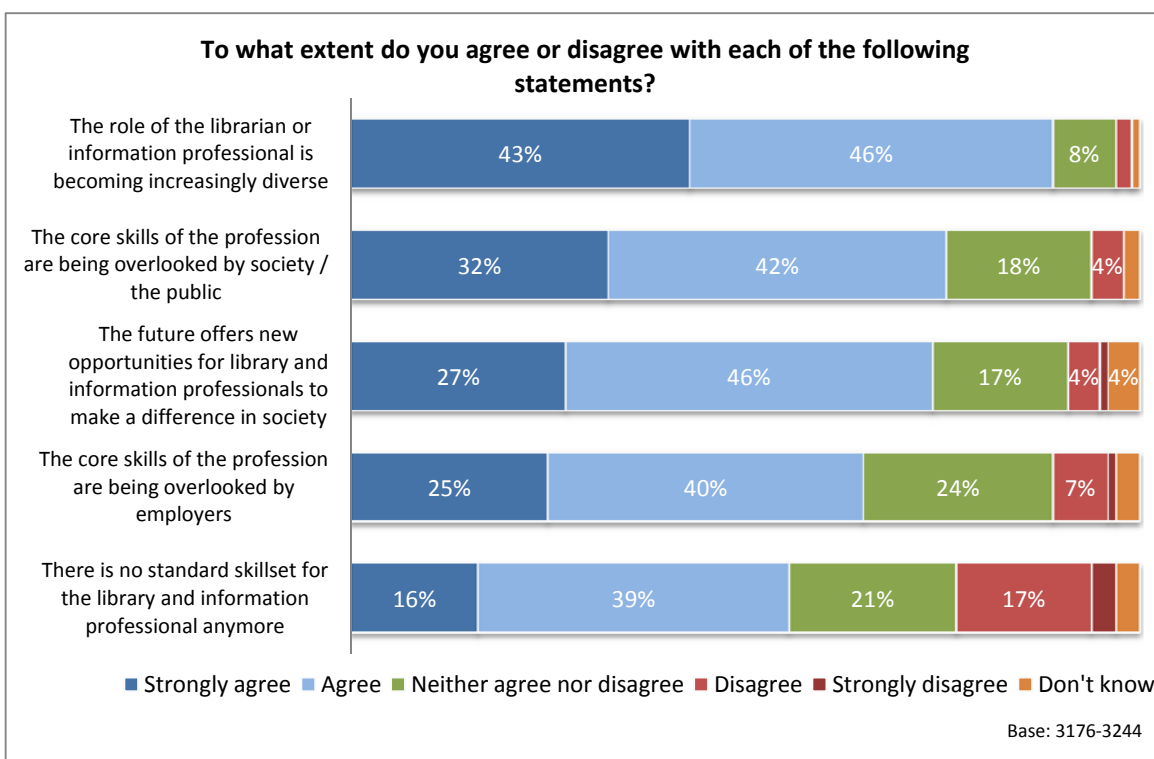
A significantly higher proportion of those working in the domain for 0-10 years use ICT, cataloguing, classification and web publishing skills.

A significantly higher proportion of those working in the domain for 21+ years use general management, business, decision support and fundraising skills.

Q20. To what extent do you agree or disagree with each of the following statements?

For the overwhelming majority, the role of the librarian or information professional is becoming increasingly diverse; 43% strongly agree with this statement. Almost three-quarters argue that the profession’s core skills are being overlooked by society, whilst a similar proportion are optimistic that the future offers new opportunities for them to make a difference in society.

Two thirds claim the core skills of the profession are being overlooked by employers and 55% assert there is no standard skillset for the library and information professional anymore.



“Librarians and information professionals are still expected to have traditional information management skills but also to be more technologically aware. For example to be familiar with Web 2.0 and social networking as well as being highly IT literate.”

“I am not sure that County Councils, or academic boards/governors really understand what we actually do. I am sure the perception is that we stamp out books and why do you need a degree, let alone a Masters degree for that? It is a profession sadly lacking in professional status, reflected in both pay and attitude.”

“A lot of the skills needed for the job are more generic (e.g. staff management, budget management) and many of the jobs in traditional "librarian" areas like cataloguing are shrinking in number.”

“Because each job will require its own specialist skillset. For many employers there will be a need to employ more than one information specialist depending upon the specific area of

need. The role of the librarian is expanding and it would be impossible for one person to have an in depth knowledge of everything other than on a superficial level."

"I don't understand why we are not ruling the world! Information overload and WE have the knowledge and skills to order all that knowledge. We need to make people realise that we have the skills to help people find information."

The school sector is one in which the core skills are most felt to be overlooked. Compared to the total sample, a significantly higher proportion of those in the listed sectors agree with the following statements:

- Health: the future offers new opportunities to make a difference
- Public/local government: the core skills are being overlooked by employers; there is no standard skill set anymore
- School: the core skills are being overlooked by society; the core skills are being overlooked by employers

6.2 Future skillset

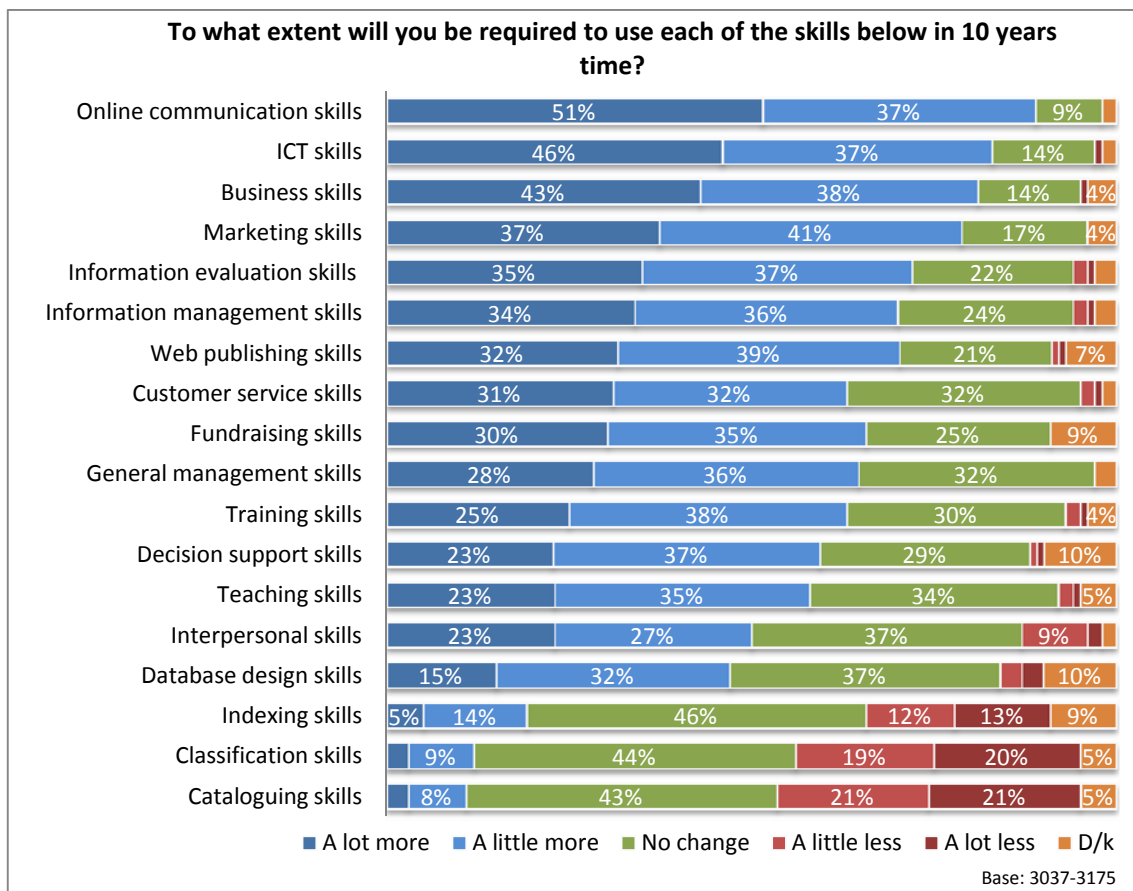
Q31. To what extent do you think you will be required to use each of the skills below in 10 years time? (Please answer even if you expect to be retired or not working in 10 years.)

Those in the knowledge and information domain foresee an increase in the use of online communication, ICT, business and marketing skills alongside a decrease in their use of the more traditional skills of classification and cataloguing in 10 years time.

88% expect to be using more online communication tools in 10 years time; 51% anticipate a lot more use compared with today. Around eight in ten expect to use more ICT, business and marketing skills in 10 years time, whilst around 7 in 10 expect information evaluation, information management and web publishing skills will be in greater demand.

Around two-thirds expect an increase in their use of customer service, fundraising, general management, training and decision support skills. 6 in 10 expect teaching and interpersonal skills to increase and almost half expect to be utilising database design skills more frequently in a decade's time.

Around 40% envisage less classification and cataloguing, whilst a similar proportion expect no change.



Compared to the total sample, a significantly higher proportion of those in the listed sectors expect to use the following skills more in the next 10 years:

- Academic: teaching
- Government: indexing
- Health: business, database design, decision support, information evaluation, information management, web publishing
- Industrial/Commercial/Legal: indexing
- Public/local government: customer service, decision support, fundraising, general management, ICT, marketing skills, interpersonal
- School: database design, ICT, information evaluation, information management, teaching, web publishing

Compared to the total sample, a significantly higher proportion of those in the listed sectors expect to use the following skills less in the next 10 years:

- Public/local government: cataloguing, classification, indexing
- School: training; cataloguing, classification

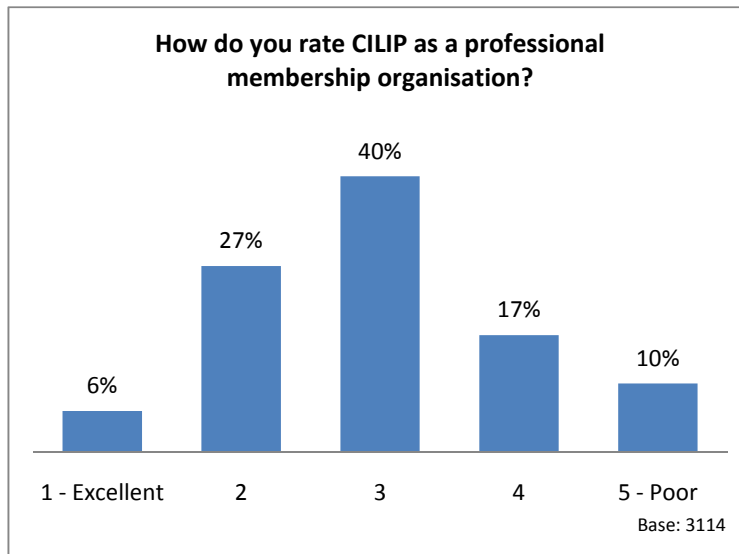
A significantly higher proportion of those working in the domain for 0-10 years believe that they will use database design, general management, ICT, teaching, training, web publishing skills more in the next 10 years, compared to the total sample.

Section 7: CILIP today

7.1 CILIP rating

Q34. Overall, how do you rate CILIP as a professional membership organisation, on a scale of 1 to 5 where 1 = excellent and 5 = poor? It does not matter whether or not you are a member of CILIP, it is your impressions we are interested in.

The majority providing a rating claim that CILIP occupies the middle ground as a professional membership organisation. A third rate CILIP as 1 (excellent) or 2, whilst 27% rate the organisation as 4 or 5 (poor).



CILIP is rated positively by significantly more of those working in schools, those not in paid employment, those who have never been a member and those who have been in the profession for up to just 10 years, compared to the total sample.

		Rating CILIP 1 (excellent) or 2 out of 5	Base
	Total	33%	3114
Sector	Academic	35%	881
	Government	37%	210
	Health	29%	211
	Industrial/Commercial/Legal	27%	200
	National	31%	124
	Public/Local Government	25%	711
	School	42%	336
	Not in paid employment	46%	123
Membership status	Member	34%	2601
	Lapsed member	17%	362
	Non-member	53%	105
Length of time in library and information domain	0-10 years	39%	898
	11-20 years	32%	815
	21+ years	30%	1363

A significantly higher proportion of those in the following Special Interest Groups rate CILIP positively:

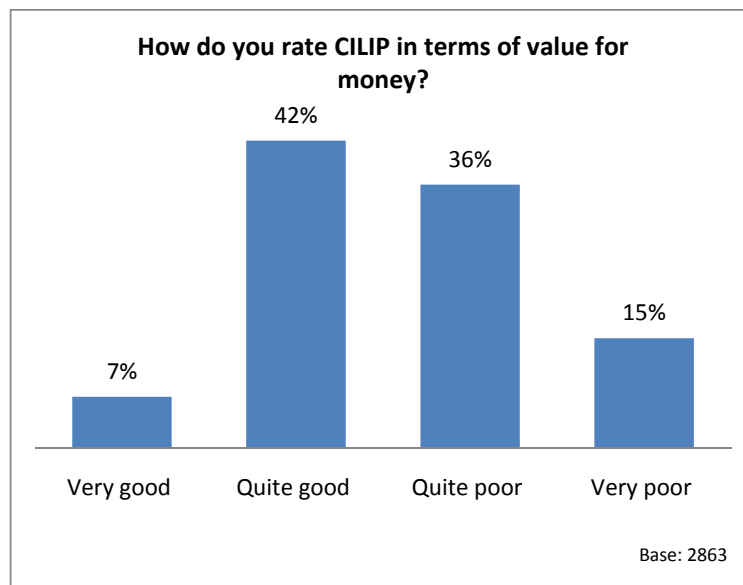
- Colleges of Higher and Further Education (43%)
- Education Libraries Group (43%)
- International Library and Information Group (46%)
- Library and Information Research Group (50%)
- School Libraries Group (45%)

A significantly smaller proportion of those in the Diversity Group rate CILIP positively.

7.2 CILIP value for money

Q36. How do you rate CILIP in terms of value for money? Again, it does not matter whether or not you are a member of CILIP, it is your impressions we are interested in.

Those in the knowledge and information domain are split in around equal proportion when asked to rate CILIP's value for money; 49% claim very or quite good value for money, while 51% argue very or quite poor value for money.



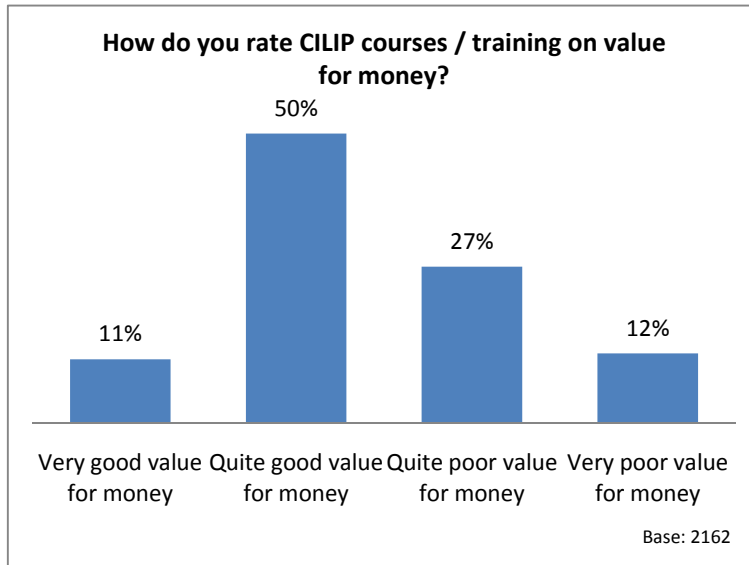
Significantly more members rate CILIP as good value for money compared to the total sample, as do significantly more of those working in the government sector. By comparison, significantly fewer lapsed members and those in the public/local government sector rate CILIP as good value for money.

		Rating CILIP as good value for money	Base
	Total	49%	2863
Sector	Academic	49%	823
	Government	62%	188
	Health	48%	197
	Industrial/Commercial/Legal	46%	182
	National	49%	115
	Public/Local Government	43%	663
	School	54%	309
	Not in paid employment	59%	111
	Membership status	Member	53%
Lapsed member		19%	328
Non-member		51%	73
Length of time in library and information domain	0-10 years	51%	816
	11-20 years	48%	759
	21+ years	49%	1254

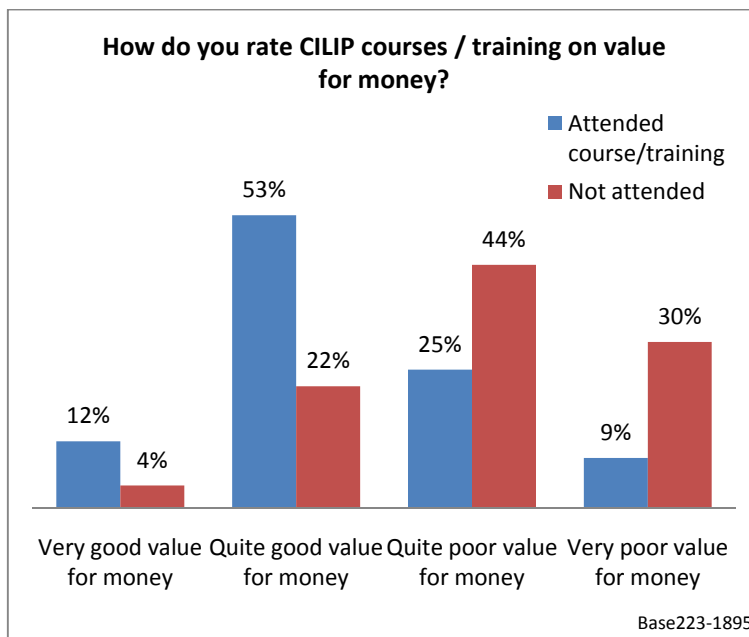
7.3 Courses and training

Q49. How do you rate CILIP courses / training on value for money?

Overall, CILIP's courses and training are considered to be quite good value for money. 50% of those able to comment say this, while a further 11% say they are very good value for money; 39% disagree.



Those who have attended CILIP courses/training are more positive about them than those who have not. Two-thirds of attendees describe them as good value for money, while just a quarter of non-attendees say the same.



A significantly higher proportion of attendants in the government and school sectors feel CILIP courses/training are good value for money, compared to the total sample. A significantly lower proportion of attendants in the health and public/local government sectors say this.

A significantly higher proportion of non-members who have attended CILIP courses or training rate them as good value for money, in contrast to a significantly lower proportion of lapsed members.

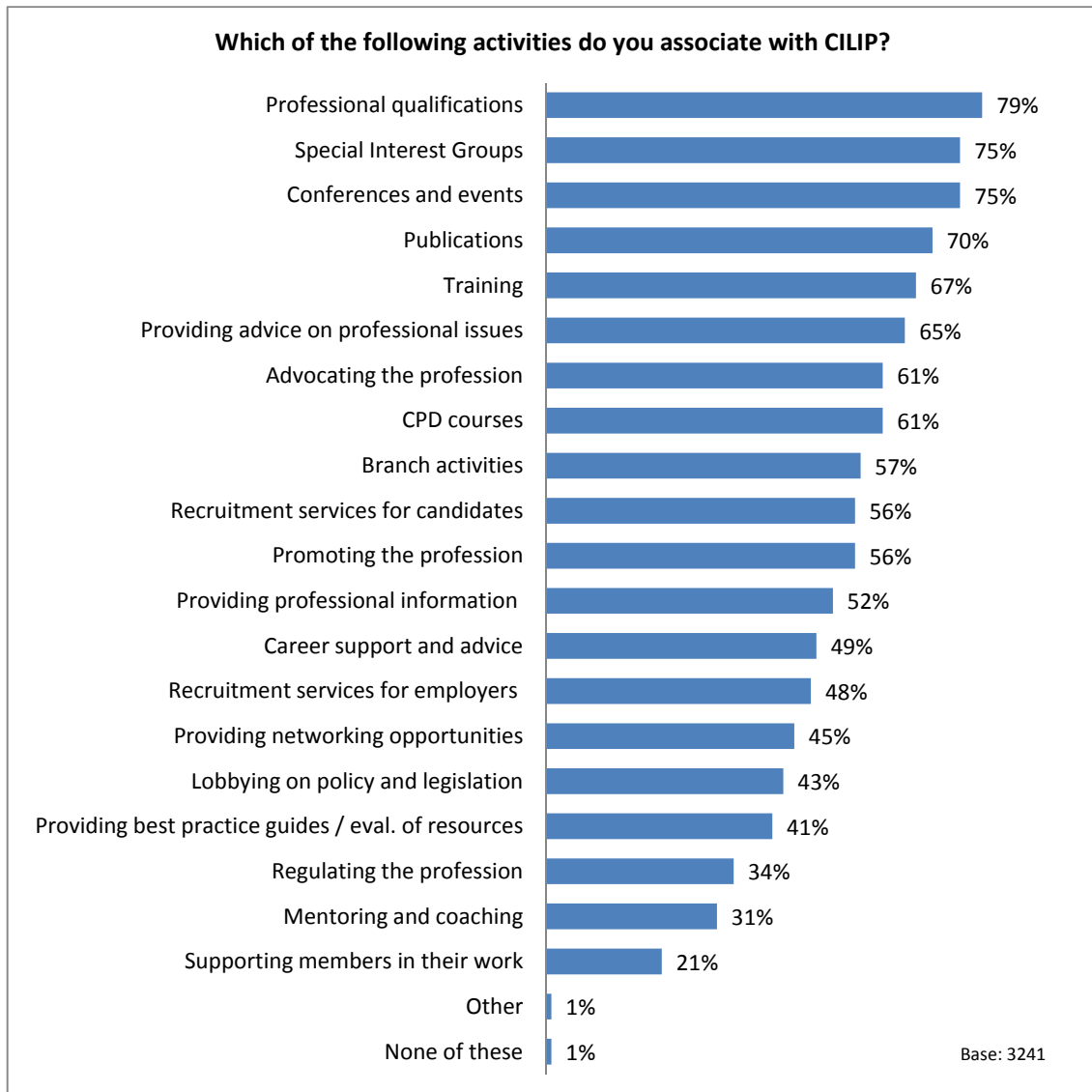
		Attendants rating CILIP courses / training as good value for money	Base
	Total	65%	1895
Sector	Academic	64%	607
	Government	79%	151
	Health	51%	153
	Industrial/Commercial/Legal	73%	108
	National	71%	86
	Public/Local Government	59%	418
	School	74%	173
	Not in paid employment	72%	53
Membership status	Member	66%	1583
	Lapsed member	52%	214
	Non-member	78%	73
Length of time in library and information domain	0-10 years	63%	298
	11-20 years	63%	535
	21+ years	68%	853

7.4 CILIP's activities

Q40. Which of the following activities do you associate with CILIP?

On average, those in the knowledge and information domain select 11 activities that they associate with CILIP. Professional qualifications are most frequently associated with CILIP, almost 80% state this. Three-quarters associate CILIP with special interest groups and conferences and events, 70% associate them with publications, 67% training, 65% providing advice on professional issues and 61% advocating the profession and CPD courses.

Those in the knowledge and information domain are least likely to associate CILIP with regulating the profession, mentoring / coaching and supporting members in their work.



Compared to the total sample, a significantly higher proportion of those in the listed sectors associate CILIP with the following:

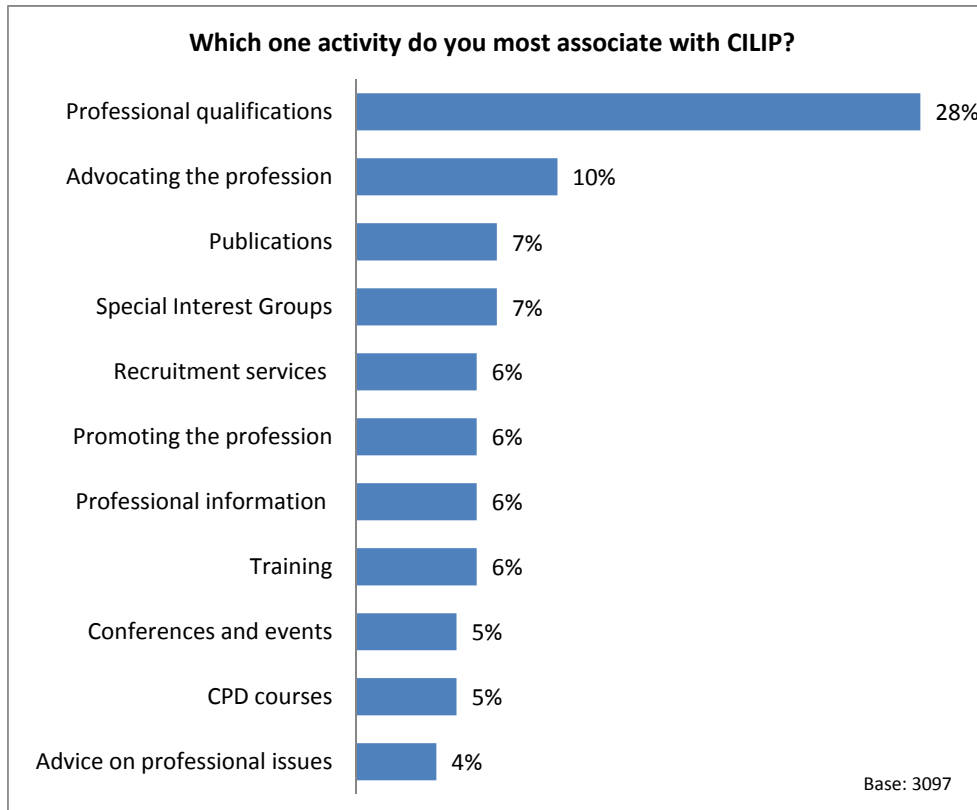
- Academic: CPD courses and training
- Government: best practice guides and the evaluation of resources, recruitment services for employers and network opportunities
- Health: CPD courses and training
- School: professional qualifications, publications, providing advice on professional issues, advocating the profession, promoting the profession, providing professional information, career support and advice, lobbying on policy and legislation, regulating the profession, supporting members in their workplace, CPD courses, best practice guides and the evaluation of resources
- Public/local government: conferences and events

Those more experienced in the knowledge and information domain associate the most activities with CILIP (an average of 12 activities selected amongst those in the domain for 21+ years, compared to 10 amongst those in the domain for 0-10 years).

A significantly higher proportion of those working in the domain for 21+ years associate CILIP with professional qualifications, special interest groups, conferences and events, publications, providing advice on professional issues, advocating the profession, branch activities, promoting the profession, providing professional information, recruitment services for employers, lobbying on policy and legislation, best practice guides and the evaluation of resources, regulating the profession and supporting members in their workplace.

Q41. Which one activity do you most associate with CILIP?

28% cite professional qualifications as the one activity they most associate with CILIP. 10% most often relate CILIP with advocating the profession, 7% publications and special interest groups, 6% recruitment services, promoting the profession, professional information, training and 5% associate it with conferences and events and CPD courses.

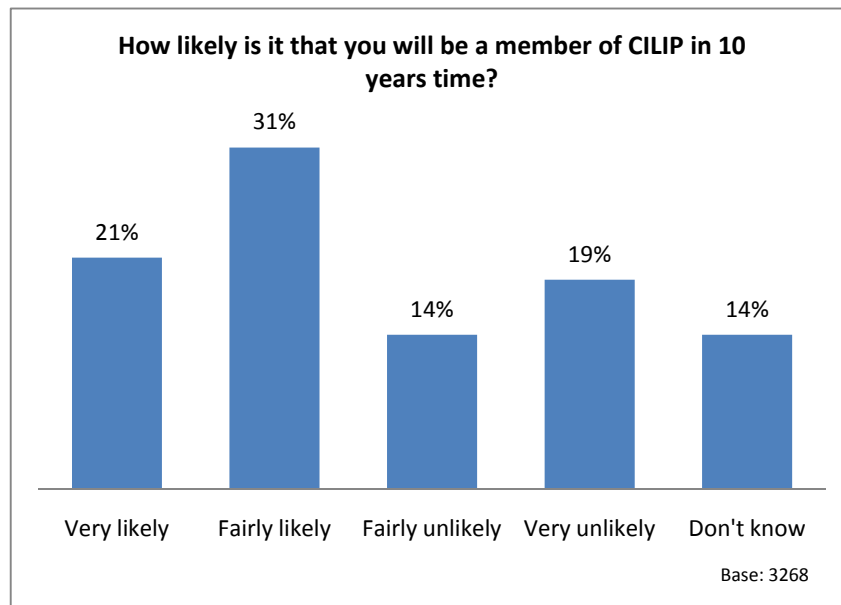


Section 8: CILIP's future

8.1 Future membership

Q38. How likely is it that you will be a member of CILIP in 10 years time?

Just over half anticipate being members of CILIP in 10 years time. A third claim this is unlikely; 19% state very unlikely. 14% are unsure.



Significantly more of those working in the academic sector say it is likely they will be a member in 2020, as do CILIP members and those who have been in the knowledge and information domain for up to 20 years.

		Likely to be a member of CILIP in 10 years	Base
	Total	52%	3268
Sector	Academic	56%	929
	Government	49%	219
	Health	54%	216
	Industrial/Commercial/Legal	54%	208
	National	46%	131
	Public/Local Government	48%	742
	School	53%	347
	Not in paid employment	60%	129
	Membership status	Member	59%
Lapsed member		16%	399
Non-member		13%	148
Length of time in library and information domain	0-10 years	60%	961
	11-20 years	57%	858
	21+ years	44%	1410

8.2 CILIP in the future

Q42. Now please rate each of the following in terms of how important you think it is that CILIP provides or engages in them over the next 10 years. (Asked of members and those planning to be members).

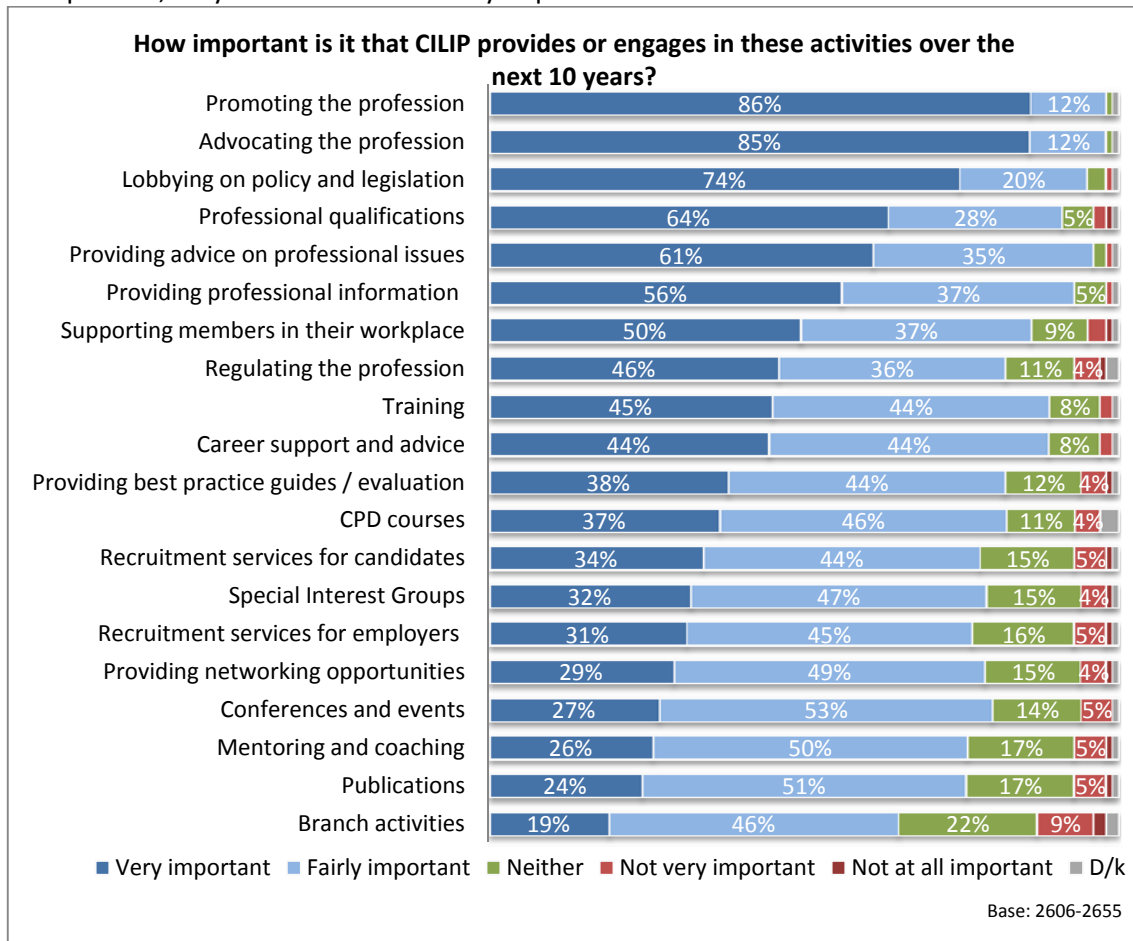
Members and future members are unanimous; it is imperative that CILIP promotes the profession, advocates the profession and lobbies on policy and legislation.

Second to these, professional qualification and providing advice and information on professional issues are important to over 9 in 10.

Around 9 in 10 place importance on supporting members in the workplace, regulating the profession, training and providing career support and advice.

82% value best practice guides and evaluation, 83% CPD courses, 78% networking opportunities, 80% conferences and events, 76% mentoring and coaching, and 65% branch activities.

Least importance is placed on branch activities; while relatively few say these are unimportant, only 19% see them as very important.



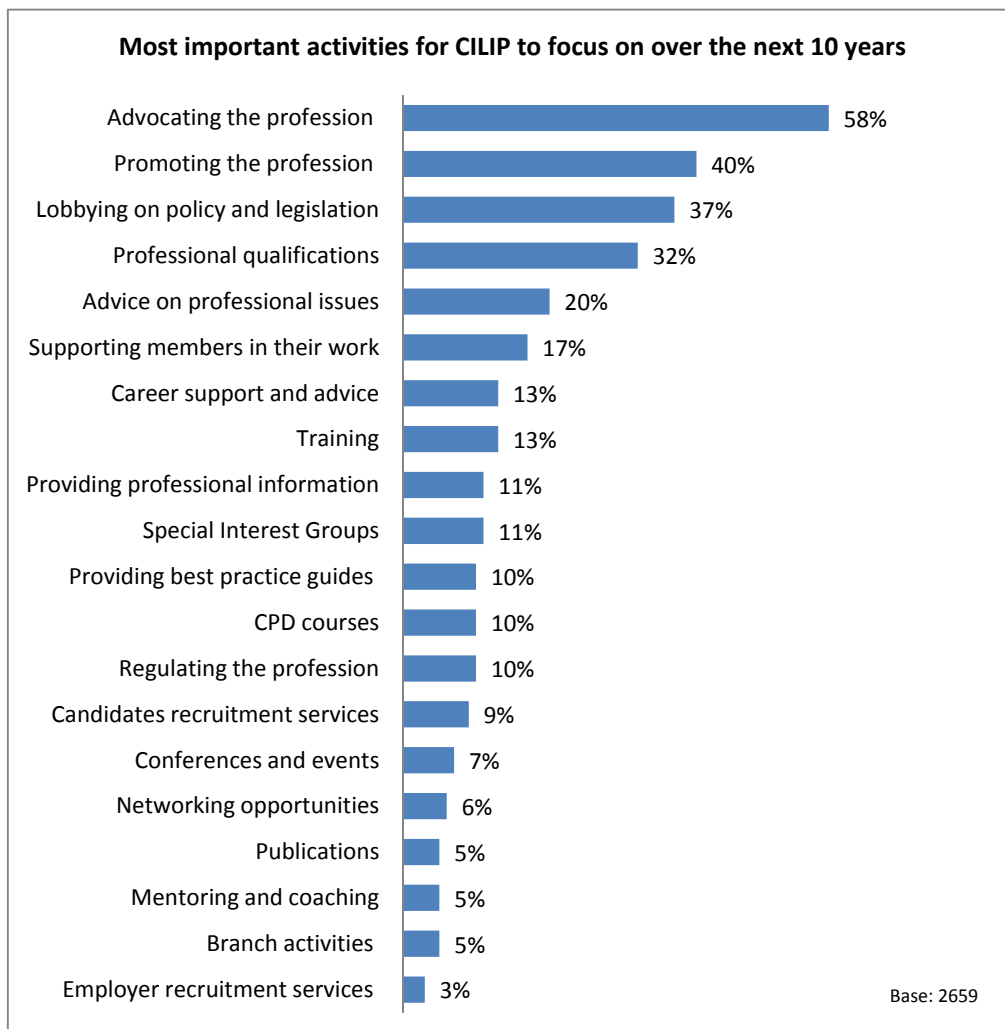
8.3 CILIP's future focus

Q44. Which are the three most important activities for CILIP to focus on over the next 10 years? (Asked of members and those planning to be members).

Unsurprisingly then, members and future members place most importance upon CILIP advocating their profession over the next 10 years; 58% place importance on this. In common with earlier findings in this study, promotion of the profession along with lobbying on policy and legislation are also seen as important.

Around a third place emphasis upon professional qualifications, a fifth on advice on professional issues, 17% supporting members in their workplace, 13% career support and advice and training.

Employer recruitment services, branch activities, mentoring and coaching, publications and networking are seen as least important to members.



“I think CILIP need to focus on advocacy, standing up for the profession and supporting members in the workplace much more than you do. It needs to be much more proactive and develop a considered position on a range of issues. It then needs to defend these positions vigorously and be much more prepared to stand up for core values and positions, even if they are unpopular.”

“It needs to raise its own profile and that of the profession in general. It needs to be more prominent in the media and ensure that it makes a contribution to consultations that are likely to affect library and information professionals working in different fields.”

“I'd like CILIP to be a stronger voice for the profession in the media. I think the biggest threat to our future is that of not being seen at all. Particularly as we become the facilitators for end user access as opposed to intermediaries, we need to be ensuring that our activities are celebrated and accepted by society as a whole...I think the Charter needs to be promoted as well, as I think the value of chartered librarians is not seen on the same level as other chartered professions among senior management and salary evaluators.”

Compared to the total sample, a significantly higher proportion of those in the listed sectors believe the following activities are in the top three areas for CILIP to focus on:

- Academic: conferences and events
- Government: regulating the profession; candidate recruitment services
- Health: CPD courses
- Industrial/commercial/legal sector: career support and advice
- Public/local government: lobbying on policy and legislation; publications

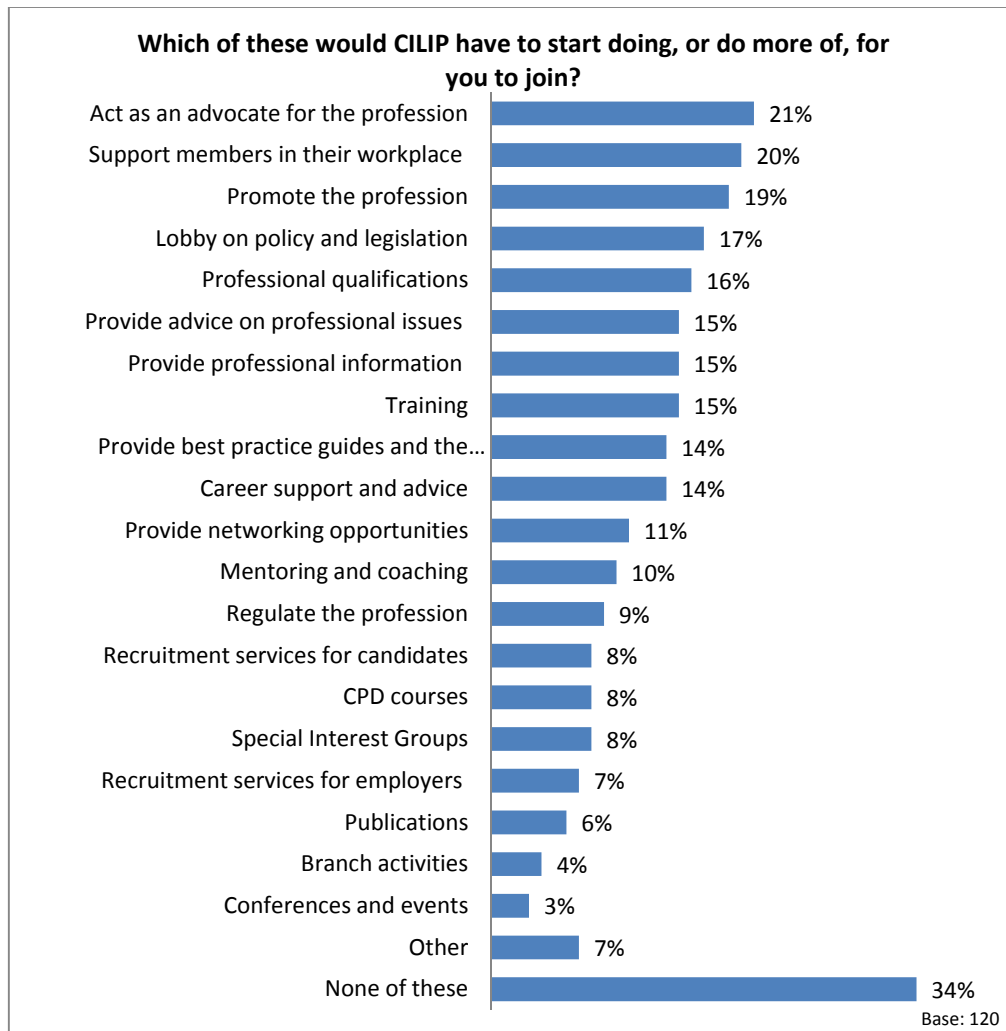
A significantly higher proportion of those in the domain for 21+ years feel lobbying is one of the top three activities for CILIP to focus on. A significantly higher proportion of those who have worked in the domain for 0-10 years feel supporting members in their workplace, career support and advice, training, mentoring and coaching and branch activities are in the top three activities.

8.4 Attracting membership

Q45. Which of these, if any, would CILIP have to start doing, or do more of, for you to consider joining as a member?

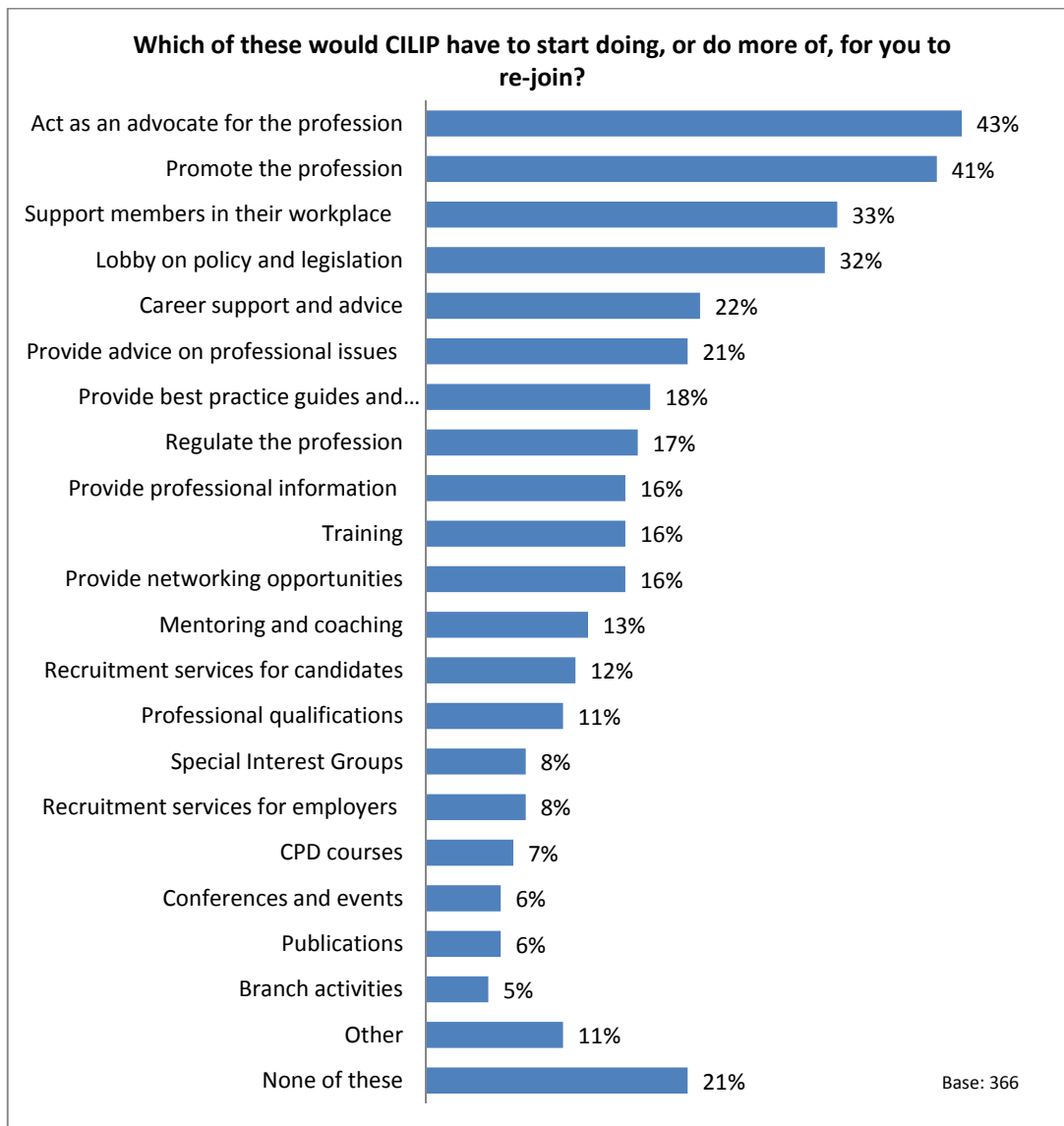
Looking at non-members, the activities that CILIP needs to engage in are consistent to those cited by members, with advocacy the primary need. Supporting members in their workplace however is more important to this group.

Recruitment services for employers, publications, branch activities and conferences / events are of least importance to non-members.



Q46. Which of these, if any, would CILIP have to start doing, or do more of, for you to consider re-joining as a member?

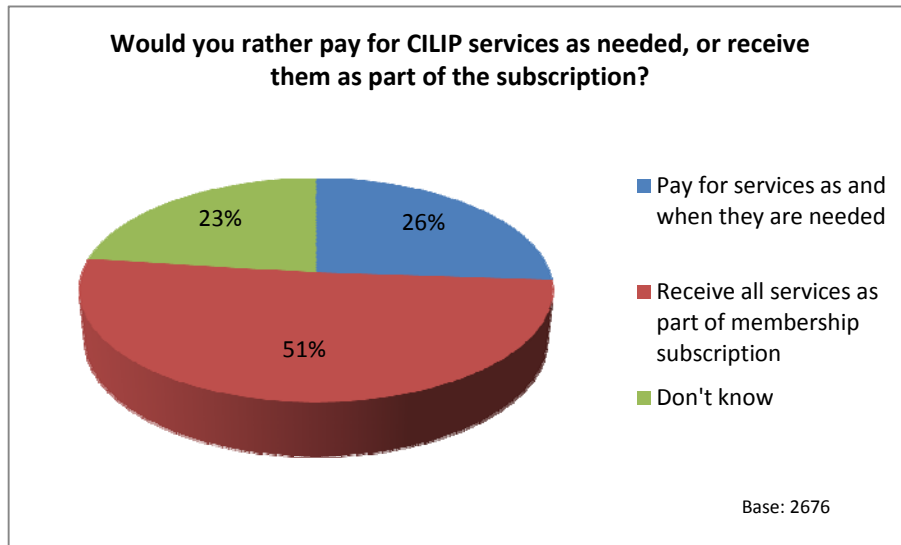
To re-engage with lapsed members, again the clear priority is for advocacy, promotion of the professions, supporting members in their workplace and lobbying on policy and legislation. Similar to non-members, conferences/events, publications and branch activities are of least importance.



8.5 Payment for CILIP services

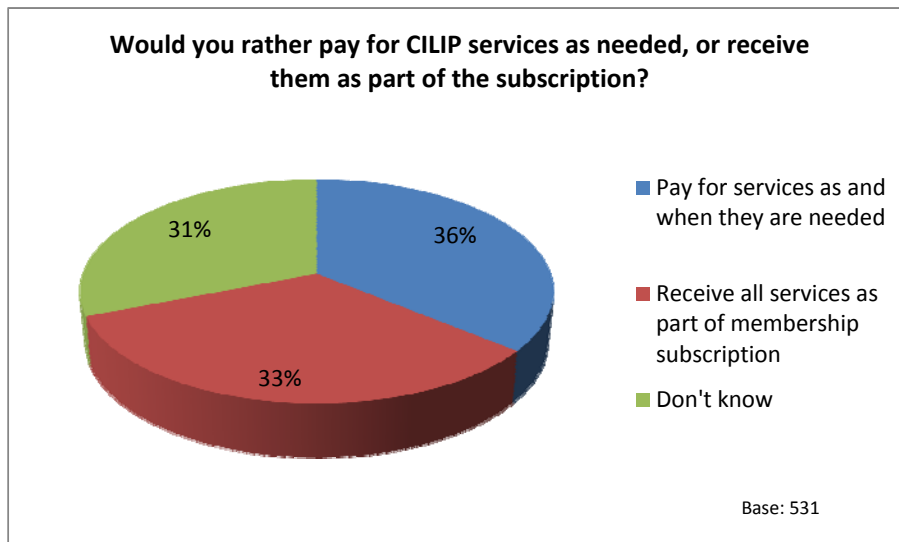
Q47. Would you rather pay for CILIP services as and when they are needed, or receive them as part of your membership subscription? (Asked of members and those planning to be members).

Amongst members and those planning on becoming a member, 51% would rather receive CILIP services as part of their membership subscription. 26% would prefer to pay for services as and when they are needed, and 23% are undecided.



Q48. If you were a member of CILIP, would you rather pay for CILIP services as and when they are needed, or receive them as part of your membership subscription? (Asked of lapsed and non-members).

Amongst lapsed members and those who have never been a member of CILIP, 36% would favour paying for CILIP's services as and when they are needed. A third would prefer to receive services as part of a membership subscription. 31% are unsure.



Section 9: Information from CILIP

9.1 Acquisition of information

Q50. How do you currently receive information from CILIP?

Q51. What is your preferred way of receiving information from CILIP?

Q52. In which way(s) would you like to receive information from CILIP over the next 10 years?

Those in the knowledge and information domain most commonly acquire CILIP information from printed magazines and CILIP's own website. Over three-quarters receive the printed Update and Gazette magazines while two-thirds take information from CILIP's website. This mirrors the favoured mediums for obtaining CILIP information.

39% receive CILIP information from special interest group publications, 33% from CILIP eBulletins, 29% Update Digital, 25% special interest group eBulletins, 22% special interest group websites and 19% branch publications.

Over the next 10 years, professionals envisage placing less reliance on traditional print formats (e.g. Update and Gazette magazine) by obtaining these same publications in a digital format. Additionally, professionals foresee less reliance on CILIP's own website too. While only 7% are currently using RSS feeds for information now, 14% expect to receive information in this way in 10 years.

	Currently receive information	Preferred way to receive information	Receive information over next 10 years
Update magazine (in print)	81%	65%	53%
Gazette magazine (in print)	76%	53%	42%
CILIP website	65%	44%	47%
Special Interest Group publications	39%	20%	17%
CILIP eBulletins	33%	26%	29%
Update Digital	29%	21%	34%
Special Interest Group eBulletins	25%	22%	24%
Special Interest Group websites	22%	14%	17%
Branch publications	19%	8%	7%
Gazette magazine (digital)	18%	20%	31%
Facet Publishing books	16%	6%	6%
Special Interest Group events	15%	9%	9%
Branch eBulletins	12%	11%	13%
CILIP Events	12%	6%	7%
Branch websites	9%	6%	9%
Branch events	9%	4%	5%
CILIP Twitter accounts	8%	7%	8%
CILIP blogs	8%	5%	9%
RSS from CILIP website	7%	9%	14%
CILIP Communities discussion forums	6%	4%	6%
Other	2%	1%	2%
None of these	4%	3%	3%
<i>Base:</i>	3206	3138	3029

How currently receive information – sub-group analysis

Compared to the total sample, a significantly higher proportion of those in the listed sectors currently receive information from CILIP in the following ways:

- Academic: Facet publishing books; CILIP Events; CILIP Twitter accounts
- Health: Update Digital; Special Interest Group eBulletins; Special Interest Group websites; Gazette magazine (digital); Branch eBulletins; RSS from CILIP website
- Industrial/commercial/legal sector: CILIP eBulletins; Special Interest Group eBulletins; RSS from CILIP website; CILIP Communities discussion forums
- Public/local government: Update magazine (in print); Gazette magazine (in print); Special Interest Group publications
- School: CILIP eBulletins

A significantly higher proportion of those in the government sector (9%) do not receive information from CILIP in any of the listed ways, compared to the total sample (4%).

A significantly higher proportion of those in the domain for 0-10 years receive information via CILIP Twitter accounts and CILIP blogs. A significantly higher proportion of those in the domain for 21+ years receive information via Update magazine (in print).

How prefer to receive information – sub-group analysis

Compared to the total sample, a significantly higher proportion of those in the listed sectors cite the following as their preferred way of receiving information from CILIP:

- Academic: CILIP Twitter accounts
- Government: Special Interest Group publications
- Health: Special Interest Group eBulletins; RSS from CILIP website
- Industrial/commercial/legal sector: Special Interest Group eBulletins; RSS from CILIP website; CILIP blogs
- National: CILIP eBulletins;
- Public/local government: Update magazine (in print); Gazette magazine (in print); Special Interest Group publications
- School: Branch publications

More of those newer to the domain would prefer to receive information digitally, compared to those more experienced. A significantly higher proportion of those in the domain for 0-10

years would prefer to receive information via Update Digital, Gazette magazine (in digital), CILIP Twitter accounts and CILIP blogs. A significantly higher proportion of those in the domain for 21+ years would prefer to receive information via Update magazine (in print) and Special Interest Group publications.

How would like to receive information over the next ten years – sub-group analysis

Compared to the total sample, a significantly higher proportion of those in the listed sectors would like to receive information from CILIP in the following ways over the next ten years:

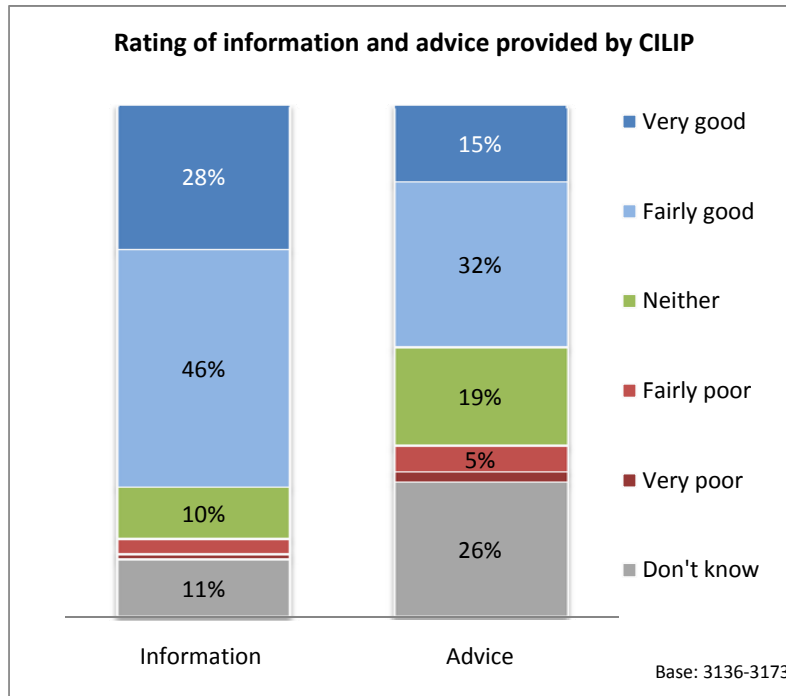
- Academic: RSS from CILIP website; CILIP Events; CILIP Twitter accounts; CILIP blogs
- Health: Special Interest Group eBulletins
- Industrial/commercial/legal sector: CILIP eBulletins; Special Interest Group eBulletins; RSS from CILIP website
- National: CILIP eBulletins
- Public/local government: Update magazine (in print); Gazette magazine (in print); Special Interest Group publications

A significantly higher proportion of those in the domain for 0-10 years would like to receive information over the next ten years via CILIP eBulletins, RSS from CILIP website, Branch websites, CILIP blogs, CILIP Twitter accounts, Facet publishing books and Branch events.

9.2 CILIP's information and advice

Q53a. How would you rate the information and advice provided by CILIP?

The majority (75%) rate the information provided by CILIP as very or fairly good. Considering the advice provided by CILIP, almost half rate this as very or fairly good, 1 in 5 rate it as neither good nor poor and 8% claim it is poor. A quarter are unable to give a rating.



CILIP information and advice is rated most positively by those in the school sector. By contrast, a significantly lower proportion of those in the industrial/commercial/legal sector describe the information and advice provided by CILIP as good.

CILIP information is perceived more positively by those newer to the knowledge and information domain; compared to the total sample, a significantly higher proportion of those working in the domain for 0-10 years rate CILIP information as very or fairly good.

Section 10: CILIP qualifications and accreditations

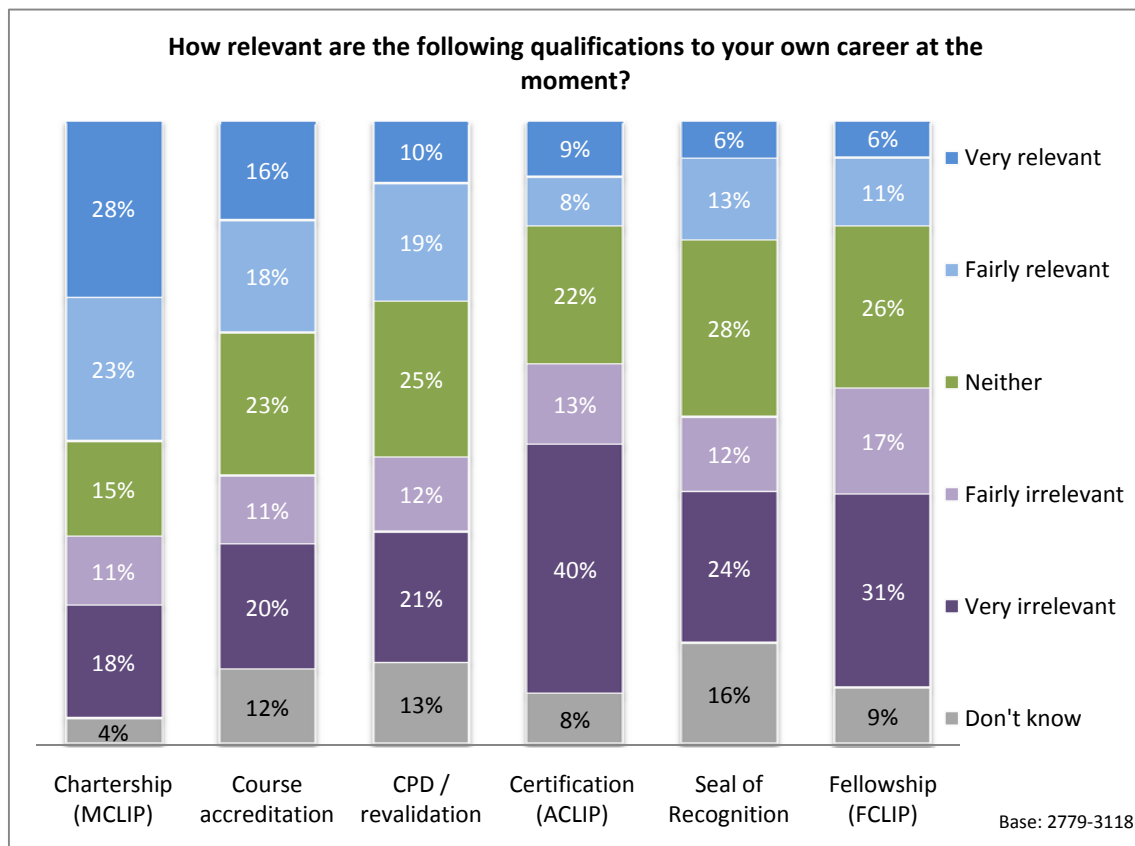
10.1 Relevance to your career

Q54/Q55. Thinking about the framework of CILIP qualifications and accreditations, how relevant are the following to your own career at the moment?

Around half of those in the knowledge and information domain claim the CILIP Chartership (MCLIP) is very or fairly relevant to their own career at present. They do not attribute the same relevance to other CILIP qualifications and accreditations.

Course accreditation and CPD both have a similar proportion, around a third, claiming they are relevant and irrelevant to their careers. Certification (ACLIP) is felt to be irrelevant to 53%; just 17% argue this is currently relevant.

Less than 20% claim the Seal of Recognition and Fellowship (FCLIP) are relevant in their careers at present.



Encouragingly for CILIP, those newer to the knowledge and information domain are the most positive regarding CILIP qualifications and accreditations. Compared to the total sample, significantly more of those who have been in the domain for 0-10 years rate Certification, Chartership, course accreditation and CPD/revalidation as relevant to them.

Compared to the total sample, a significantly higher proportion of those in the listed sectors rate the following CILIP qualifications/accreditations as relevant to them at the moment:

- Academic: Course accreditation; CPD/revalidation
- Health: Fellowship (FCLIP); CPD/revalidation; Seal of Recognition
- School: Certification (ACLIP); Chartership (MCLIP)
- Not in paid employment: Course accreditation

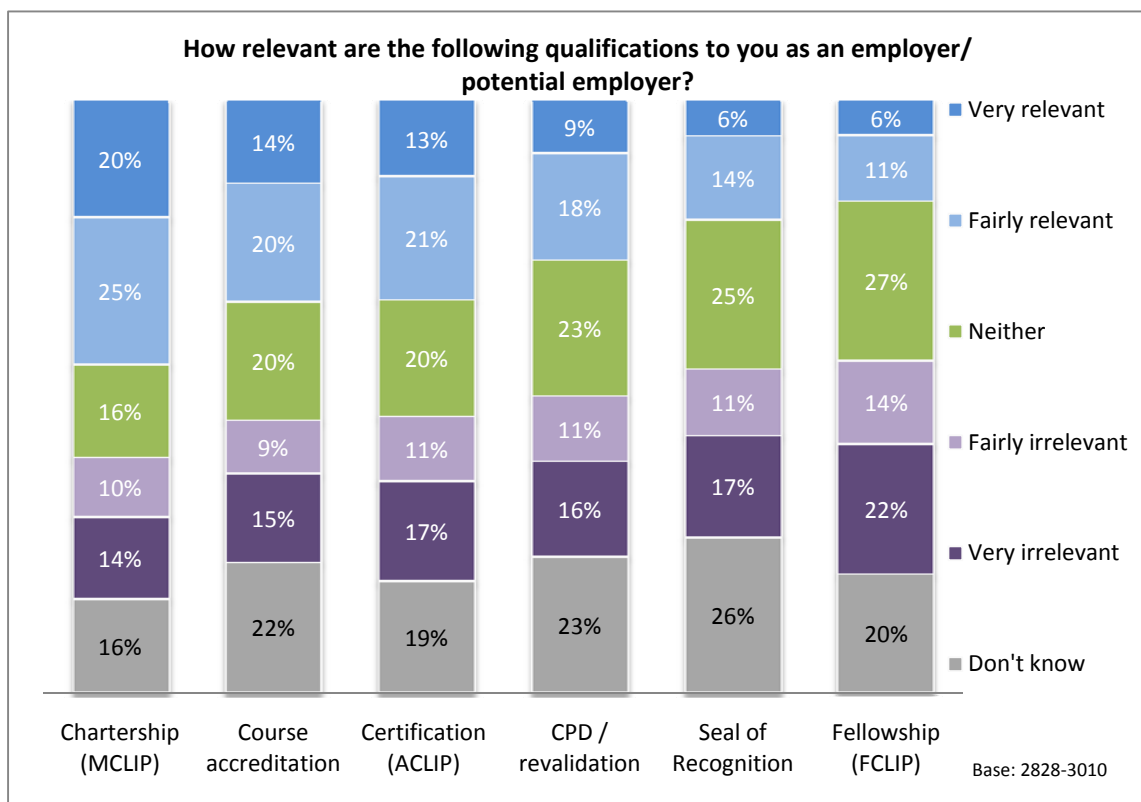
10.2 Relevance to an employer

Q56/Q57. And how relevant are the following qualifications and accreditations to you as an employer / potential employer at the moment?

Unsurprisingly, given their opinions of CILIP qualifications in respect of their own career, those in the knowledge and information domain tend to mirror those opinions when they are considered as an employer or potential employer.

45% consider CILIP Chartership (MCLIP) to be relevant; 24% disagree. A third claim course accreditation and Certification are relevant, around a quarter disagree.

Seal of Recognition and Fellowship are considered irrelevant by 28% and 36% respectively.



Significantly more of those who have worked in the knowledge and information domain for 21+ years view Certification and Chartership as relevant to them as an employer, compared to those newer to the profession. There are no statistical differences by length of time in domain for course accreditation, CPD/revalidation and Seal of Recognition of Fellowship.

A significantly higher proportion of those with Chartership see it as relevant to them as an employer compared to the total sample.

Compared to the total sample, a significantly higher proportion of those in the listed sectors see the following CILIP qualifications/accreditations as relevant to them as an employer:

- Academic: Course accreditation
- Health: Certification (ACLIP); Chartership (MCLIP); Fellowship (FCLIP); Course accreditation ; CPD/revalidation; Seal of Recognition
- Public/local government: Certification (ACLIP); Chartership (MCLIP)

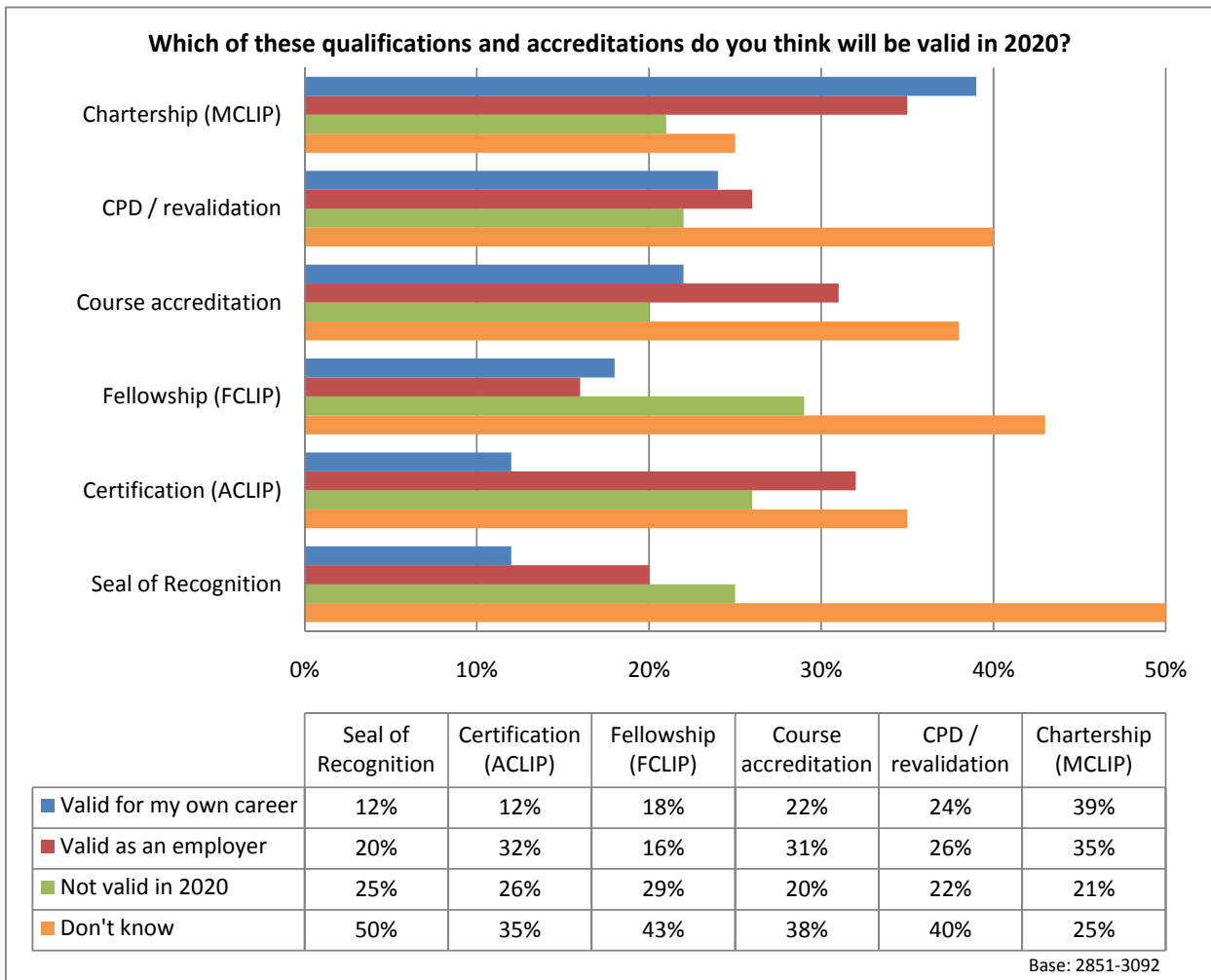
10.3 Validity in 2020

Q58/Q59. Please select which of these qualifications and accreditations, if any, you think will be valid in 2020, for your own career and as an employer / potential employer looking for candidates?

CILIP Chartership (MCLIP) is the one qualification expected to maintain a degree of relevance in 2020 to both employees and employers.

Professionals question the relevance of the remaining qualifications to them as employees, although around 30% argue course accreditation and Certification will still be valid to employers.

For all qualifications, a high proportion have been unable to predict and have answered don't know.

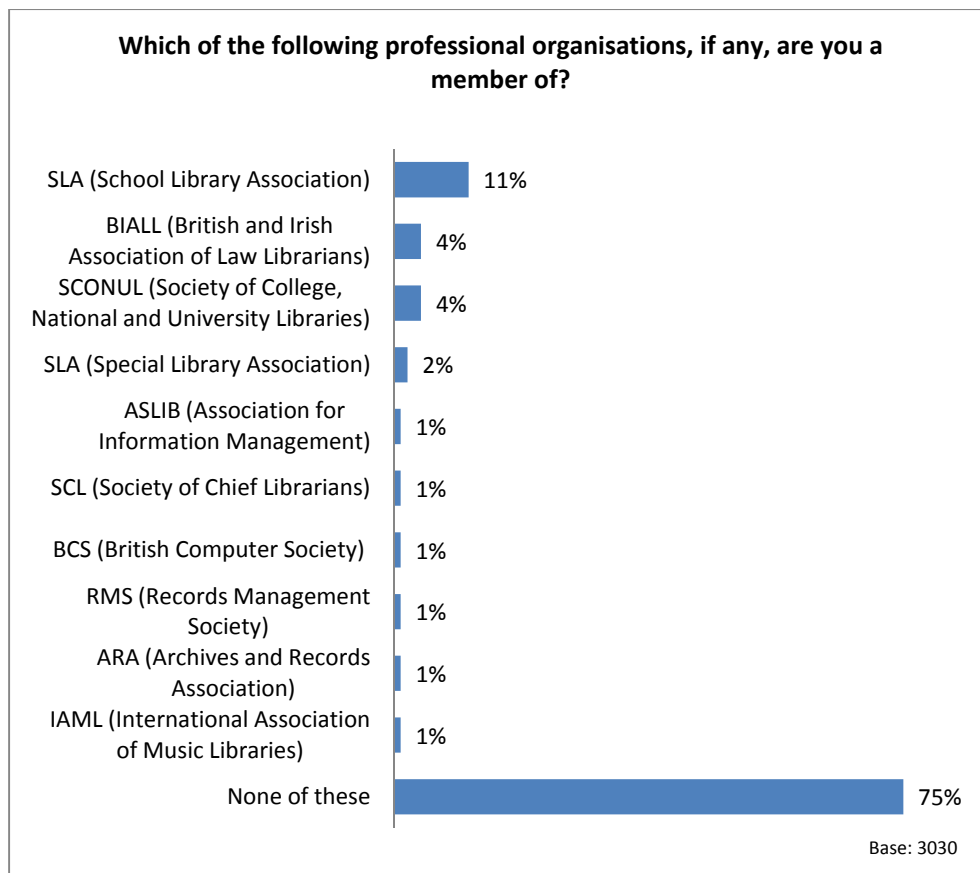


Section 11: Other professional memberships

11.1 Professional memberships

Q61. Which of the following professional organisations, if any, are you a member of?

Three-quarters of those completing the survey are not currently members of any of the professional organisations listed below. The School Library Association has the highest concentration of members (11%). 4% are members of BIALL and 4% SCONUL.



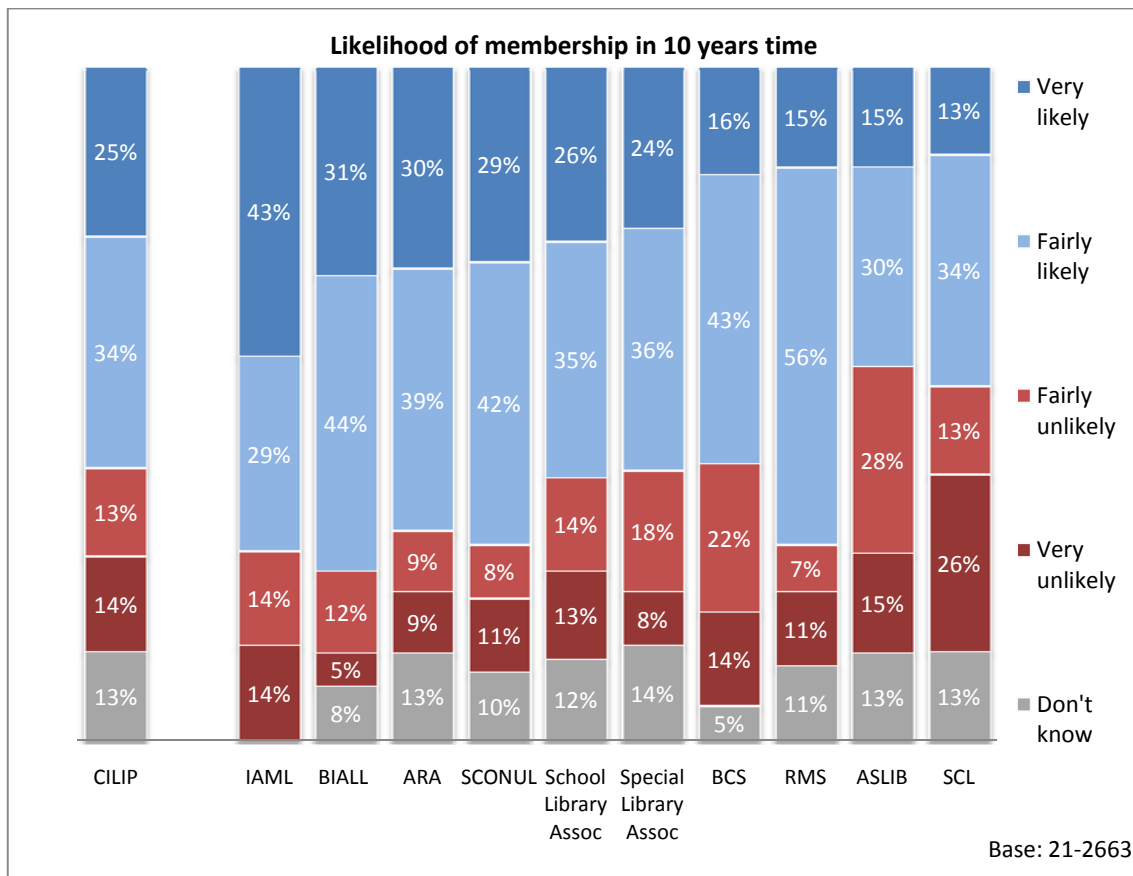
Q62. And how likely are you to still be a member of [organisation] in 10 years time?

Professional organisations need to work hard to maintain their current membership levels given that a significant number do not envisage maintaining membership in 10 years time.

The International Association of Music Librarians (IAML), the British and Irish Association of Law Librarians (BIALL) Archives and Records Association (ARA), the Society of College, National and University Libraries (SCONUL) and the Records Management Society (RMS) are the organisations where around seven in ten of their current membership believe they will still be a member in 10 years time.

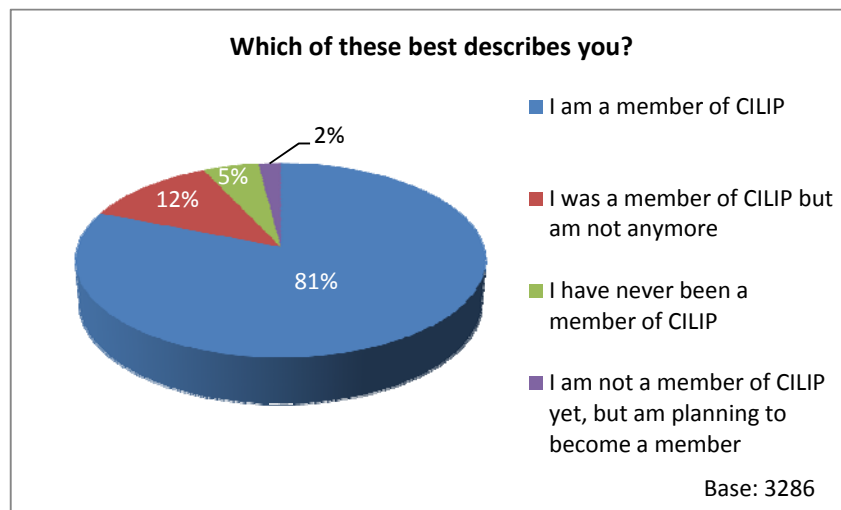
Less than half of the members of the Association for Information Management (ASLIB) and the Society of Chief Librarians (SCL) envisage still being a member in 10 years time.

Compared to these organisations, CILIP members give CILIP lukewarm ratings on future membership.



Appendix 1: Profile of quantitative survey participants

Current membership status:



Length of time a CILIP member	
5 years or less	23%
6-10 years	14%
11-20 years	21%
21-30 years	20%
31+ years	22%
<i>Base</i>	2551

CILIP membership type	
Chartered Membership (MCLIP)	57%
Associate Membership	31%
Affiliated Membership	5%
Chartered Fellowship (FCLIP)	3%
Organisation Membership	2%
Student Membership	1%
<i>Base</i>	2610

Branch a member of	
London	17%
South East	15%
Scotland	10%
East of England	9%
South West	8%
East Midlands	7%
North West	7%
West Midland	6%
Yorkshire & Humberside	6%
Wales / Cymru	4%
North East	3%
Overseas	3%
Ireland	1%
Don't know	1%
<i>Base</i>	2665

Sector	
Academic	31%
Public / local government	24%
School	11%
Government	7%
Health	7%
Industrial & Commercial	7%
National	4%
Not in paid employment	4%
Other	3%
<i>Base</i>	3042

Length of time working in knowledge and information domain	
5 years or less	12%
6-10 years	18%
11-20 years	27%
21-30 years	26%
31+ years	18%
<i>Base</i>	3237

Management status	
Senior management	14%
Middle management	36%
Junior management	16%
Practitioner	29%
Don't know	4%
<i>Base</i>	3224

Gender	
Male	20%
Female	80%
<i>Base</i>	3276

Age bracket	
Under 30	8%
30-39	22%
40-49	26%
50-59	36%
60+	9%
<i>Base</i>	3008

Appendix 2: Detailed research process

Stage 1 – Desk research using CILIP’s previous research and interviews with industry experts

- **CILIP’s previous research**

RbD reviewed all relevant past market research reports to ensure we fully appreciated the existing learning and were able build on it

- **CILIP members and activists**

In addition, we interviewed 4 CILIP members/activists to identify potential themes for consideration. The activists had considerable knowledge about some of the themes, thus helping us to design suitable stimulating questions to provoke discussion later in the process. A copy of the discussion guide can be read in Appendix 3.

Stage 2 – Desk and social media research amongst the CILIP member community

This informal stage of the project consisted of the following:

- **Website and blog review to identify existing discussion themes**

This consisted of a general review of the CILIP website news, community blogs and discussion fora to identify current concerns and excitement in this industry sector in relation to the future of the industry.

- **Participation in an interactive online discussion covering the topics of the Conversation**

For this audience we set up various channels for social media discussion.

The learning from this stage of the process provided a quick way of gaining insight to identify the focus of discussions and was fed into the next, formal qualitative, stage of the project.

Stage 3 – Desk research and social media research amongst non-CILIP member community

This stage of the project echoed the process used amongst the CILIP membership in stage 2, but including additional sites and communities of the wider information community.

Typical sites included:

- Government bodies
- Industry specialist websites
- Online specialist journals
- Other librarian / information professional organisations

Stage 4 – Formal qualitative consultation

This stage of the project consists of **6 face to face depth interviews** with industry experts identified through the Project Board.

The interviews lasted around 45 minutes and were focussed on participants' predictions of how the sector is likely to evolve over the next decade, and what impact these changes are likely to have on those working in the sector.

These types of people tended to occupy senior roles within their organisations and were very busy. Hence whilst ideally face to face interviews were sought, for expediency and to meet the project deadlines some telephone depth interviews were required.

The outcomes of these interviews were used to promote online discussions and feed into the topic guides for the formal focus discussion groups.

A copy of the discussion guide can be read in Appendix 3.

Stage 5 – Qualitative research amongst CILIP membership

This stage of the project consisted of **4 focus group discussions** held in four regions, each consisting of 8 to 10 participants and lasting at least 90 minutes. The participants for these groups were recruited from regional member lists. The four qualitative groups were not designed to be made up of representative group of those working in the knowledge and information domain; however the objective was to create a sufficient spread of input which would then be tested in the quantitative phase of the project.

A copy of the focus group topic guide can be read in Appendix 4.

Stage 6 – Review of learning with CILIP project management

This stage of the project was needed to consolidate all of the learning identified from both the formal and informal stages of the research. It consisted of a meeting with the CILIP project manager and project board to review the outputs of the previous stages of research and identify which elements need to be investigated further in the quantitative stage of the project.

Stage 7 – Quantitative online survey to members and non-members

This final stage of the project consisted of an online survey sent to members, as well as non-members. The aim was to obtain around 2000 responses across all 12 regions and all key groups of stakeholders, providing a very robust measure of the issues, preferences and needs. This was surpassed and the final sample was 3286.

An online methodology rather than telephone and paper options was decided upon since this is the most cost effective and fastest mechanism for collecting feedback. In addition it allowed for reminders to be easily sent to respondents, generating higher response rates.

Appendix 3: Discussion Guide for CILIP members / activists and Industry Expert Interviews

Introduction

Good morning / afternoon, my name is... and I work for Research by Design, an independent market research organisation. We have been commissioned by CILIP (the Chartered Institute of Librarians and Information Professionals) to conduct a study gathering opinions of where the industry is likely to be in the next ten years.

Over the next 45 minutes I will be seeking your thoughts on how you see the industry developing over the next few years.

I will be recording the conversation to help me with report writing later. However, I would like to reassure you that we follow the Market Research Society Guidelines and hence whatever you say will be kept confidential. None of your comments will be attributed to you in our reporting, any quotes we use will be anonymised.

Please feel free to speak freely in our conversation, as there are no right or wrong answers to the questions.

Interviewee warm-up and background credentials

It would help me if we could start by you telling me a little about yourself in terms of which of the information and knowledge management sectors do you feel most knowledgeable about?

Probe for industry background and experience and sector experience.

E.g. If you had to describe your areas of expertise in one sentence what would you say?

Which professional organisations are you a member of? Why?

How do you tend to keep up to date with developments in your profession?

Now thinking about your sector of the industry, what do you think are the key issues facing at present?

Probe each one for: Which industry sectors will this affect?

Do you think these issues are likely to persist into the longer term future or are they short term?

What is the likely direction / result of each of these issues?

Probe for technological, economic, social and professional implications.

LIST THE THEMES AND THEN GO THROUGH EACH ONE IN DETAIL.

Possible issues/themes depending on the areas of expertise of the interviewee may include the following:

Philosophical / pan industry issues

- Open source versus limited access

- Data sharing versus intellectual property rights and ownership
- Regulation and governance
- Source management
- Keeping information up to date
- Quality of material

Image of profession

- Range of roles and levels of professional skill
- Is there a hierarchy of professional labels/fields?
- Competence versus professional skills
- CPD – what are the core skills – tradition versus multimedia?
- Public / general perceptions of industry
- Implications for attractiveness of career – enticing people into the industry
- Is this a shrinking career sector?
- Professional networking
 - Which groups are important now?
 - Which are likely to be important in the future?
 - Probe for the role of professional organisations versus other social networking tools

The future of public libraries:

- Physical establishment
- Funding
- Role as community hub
- Role as internet access
- Declining public usage levels
- Fiction
- Non-fiction
- Skills / de-skilling of librarians and use of volunteers
- Technology – multimedia, automated renewals, online resources etc.
- Innovative approaches to governance e.g. outsourcing
- Opening hours
- Nationwide lending
- Library as a social / cultural community hub e.g. idea of library coffee shops
- Super-libraries versus branch libraries
- Relationships with learning e.g. workshops, commercial partnerships
- E-books, CDs and DVDs – free loan versus rental/charging
- Loyalty cards, membership benefits

The future of school libraries:

- How are these likely to change in the future?
- Will they integrate with public libraries?
- Paper versus electronic resources
- Fiction
- Non-fiction
- Skills / de-skilling of librarians
- Training and funding
- Other resources e.g. gaming

The future of academic libraries:

- Limited access / membership access versus open access
- Future technological changes
- Plagiarism
- Professional skills of staff – probe for how people describe themselves/others
- Importance of collaboration
- The library as an interactive learning and social space
- Balancing budgets against burgeoning costs of online journals
- The impact of Web 2.0

Commercial / Knowledge management centres

- Private / limited access
- Intellectual property rights
- Protection / security from theft / hacking
- Networking / partnerships with other knowledge owners

Archive managers

- The way forward for digital curation
- The increasing role of 'citizen archivists'/advocates / collaborators (the non-professionals)
- The professional image of the profession
- The future of the professional archivist
- Governance and authority – where does the expertise lie in archive management/tagging etc.?
- Importance of collaboration
- The future of publications
- The impact of Web 2.0

Other issues / themes

- What other themes or issues do you think are likely to become prominent in the coming years? Why? How?
- What are likely to be the implications of these?

Thinking about CILIP:

- What phrases or adjectives would you use to describe CILIP?
- Will it still be here in 10 years time? Why? Who will succeed it and why?
- To survive and thrive what should it focus on delivering to its members over the coming years?
- Is there a need for a new professional body combining museums, libraries and archives? If so, what powers / role should it play?
- What would be the first thing you'd do if you were in charge of it?

Close and thanks

Appendix 4: Topic Guide for 4 CILIP focus groups discussions

Introduction

Good morning / afternoon, my name is... and I work for Research by Design, an independent market research organisation. We have been commissioned by CILIP (the Chartered Institute of Librarians and Information Professionals) to conduct a study gathering professionals' opinions of where the industry is likely to be in the next ten years and how CILIP needs to adapt to meet the changing needs of its members and potential members.

Over the next 90 minutes I will be seeking your thoughts on these points.

Note on fire escapes and drills etc.; note on refreshments and comfort breaks.

I will be recording the conversation to help me with report writing later. However, I would like to reassure you that we follow the Market Research Society Guidelines and hence whatever you say will be kept confidential. None of your comments will be attributed to you in our reporting, any quotes we use will be anonymised.

Please feel free to speak freely in our conversation, although I would be grateful if you would not talk over one another so that I can hear what everybody says.

There are no right or wrong answers to the questions; we are merely trying to gather as wide a perspective on the issues as possible. Therefore please do give your comment even if you think it differs from other members of the group.

Warm-up and background credentials

It would help me if we could start by you telling me your first name, a little about your job and how long you have worked in the sector?

Introduction to the industry themes

Thinking about the library and information management industry, what are the key issues or debates of the moment?

How do you see these being resolved? Probe regarding impact of recession and election.

What will this mean for the future of the industry? Probe re budget impact

What about your future, how will these changes affect your working day?

Do all these issues face all sectors of the industry? If not, which sectors?

Probe for the themes and issues identified through previous research (e.g. fragmentation of profession, governing bodies, new skills required, economic downturn, decline in library usage, etc).

Rich picture exercise - your role in 2020

Now I have a creative task for you to do. I'd like you to imagine that you are still in the same industry in ten years time, draw me a picture of yourself in your work environment.

It doesn't have to be a work of art, stick men are fine.

For example, say you work in a library:

What will it look like?

What resources and facilities will it have?

What sort of resources will you manage – books, multimedia resources, apps?
Will it be a physical place or will you be based at home?
Who will your customers be, and how will they interact with you – face to face, via phone apps etc.?
What sort of hours will you work?
How will you keep in touch with colleagues and peers?
Will you be linked in with other, similar organisations? How will that work?

ASK EACH TO DESCRIBE THEIR PICTURE AND DISCUSS THEM.

Image of profession

Now I'd like you to talk about the image of your profession.
Tell me some job titles people associate with your profession (LIST ON FLIPCHART)
How do you think the public generally perceive these roles?

For example:

- Librarian
- Knowledge/information professional
- Other labels (to build in)

How do you think of these roles? Is there a hierarchy of skill, perceived value?
What about unskilled workers in the field, or public/amateurs, how do they impact on perceptions of your career?

Do you think public perceptions of the industry affect the attractiveness of information management as a career? How so?

Do you think that is likely to change in the future? Why? How?
What role will competence or professional qualifications have to play in that?
What are likely to be the core skills for future industry professionals?

Is this a shrinking career sector?

Professional networking

Do you tend to keep in touch with other people working in your sector?
How important to you is it to keep in touch with other professional in your industry?
Which groups are important now?
Likely to be important in the future?
Probe for the role of professional organisations vs. other social networking tools

Professional / membership organisations

Which professional membership organisations are you a member of? Why?
Which do you like best? Why?
Which is best value for money? Why?
Are there any gaps in provision of support / governance by professional bodies and associations?
Are there too many – do they overlap? Which aspects? Which organisations?

Voting exercise

What are the main benefits of belonging to a professional organisation, both now and what are they likely to be in ten years hence (LIST ON FLIPCHART)?

Possibles could include:

- Professional qualifications
- Chartership
- CPD – break this down into type e.g. traditional skills and technology related skills
- Events and conferences
- E-bulletins / newsletters
- Gazette / journal
- Other published documents / books
- Governance guidance
- Networking opportunities
- Recruitment opportunities / job adverts
- Consultancy advice
- Professional / industry updates
- Advocating the value of what we do

PROBE FOR REASONS.

Ask respondents to vote using 5 dots for which are the most important aspects of belonging to a membership organisation (they can put all five dots against one item or spread them amongst five items to emphasis importance).

Next ask them to indicate what are likely to be the most important benefits of a membership organisation in 10 years time, again using 5 dots.

Finally ask respondents to think about belonging to CILIP, and to use another five dots to indicate what the benefits of belonging to CILIP currently are.

Thinking about CILIP

- What phrases or adjectives would you use to describe CILIP?
- Will it still be here in 10 years time?
- How will it need to change for it still to be value for money in the future?
- Do you think other professional organisations are better placed to survive? Who? Why?

Possible ideas for change

Having already started thinking about the future, CILIP has provided us with some possible changes it could make:

- Contact methods – All electronic versus phone and post
- Newsletters / journals – All electronic versus some paper
- Levels of membership and fees accordingly

FOR EACH SUGGESTION PROBE THE PROS AND CONS. IDENTIFY THE MOST ATTRACTIVE CHANGES.

- Probe re Special Interest Groups vs. branches
- Probe re qualifications / chartership

Finally, if CILIP was a celebrity or a famous person who would it be and why?

Close and thanks.