

HLG Professional Development Needs Project

Summary, Conclusions and Recommendations

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1. INTRODUCTION

In seeking to “gain a better understanding of the professional development needs of HLG members and potential members”, HLG commissioned research involving:

- A competitor analysis of other membership organisations
- Survey work with members, lapsed members and non-members
- Focus groups with members

The background, methodology and detailed findings of the above strands are covered in three separate reports. This is the fourth in the series of reports and provides the overall summary, conclusions and recommendations arising from the project work.

2. COMPETITOR ANALYSIS – SUMMARY AND CONCLUSIONS

Within the current economic climate and set against a backdrop of falling numbers, there seems to be a drive by many membership organisations to clearly set out the benefits and added value of membership. Similarly, there appears to be increasing efforts to engage and develop relationships with members and enhance member perceptions of ‘return-on-investment’ and ‘value-for-money’.

Linked to this, there is apparently increasing recognition of the diversity of membership and the diversity of member needs, preferences and learning styles so that members are being offered considerable choice in relation to CPD, networking, ways of keeping up-to-date, resources and other support services. Recognising member diversity and responding in this way is almost certainly helping to remove barriers and facilitate member engagement.

To further ‘add value’ and to provide truly member-focused support, several membership organisations are segmenting their membership base and seeking to address the needs of different segments in a focused and tailored way, for example offering ‘career stage’ mentoring, resources and careers advice.

There is increasing and creative use of web developments and social networking technology to support professional development, keep members in touch with sector news and intelligence, engage and connect members and create and sustain communities of interest. Some of the e-bulletins, certainly, have attracted considerable interest from members but, in general, the organisations’ websites provide little ‘hard’ data on the member uptake of – or satisfaction with – e-approaches to support services. Clearly, though, the e-approach does provide another channel to meet member preferences for communication and engagement.

There is an increasingly creative range of e-learning opportunities being made available to members with some of the larger membership

organisations making use of YouTube, WebTV, podcasts, pre-recorded webcasts and live webinars to support learning and offering members a wide range of on-line study and instructor-led professional development modules. Others simply link or signpost to existing modules on offer from other providers. However, whilst many of the membership organisations do provide member access in one form or another to a range of e-learning opportunities, several still have an e-learning gap in their CPD portfolios.

With technology enabling access to vast knowledge repositories, there is an apparent drive by many organisations to develop their websites into 'one-stop shops' of information and resources for their membership. Certainly, some of the organisations provide access to a huge range of information which is likely to be of interest and use to their members. Key challenges seem to be keeping the information up-to-date, communicating the existence of the databanks with members and providing website navigation that supports easy search and access.

Many of the organisations offer special membership packages for new and/or younger members. Such packages include discounted membership, CPD and conference rates, special bursaries and other financial support, tailored welcome packs, handbooks and resources, social events, targeted newsletters and dedicated support structures and initiatives (eg, discussion groups, advice channels, 'wikis' and support for career development). Longer-term sustainability of the membership organisations is most likely the main driver of such initiatives.

With responsibility for membership support often spread across a wide range of committees, task forces, offices and support units, many membership organisations seem to struggle to find a simple, coherent organisational structure for member support. Given the many inter-relationships across support areas, this is not wholly surprising but it does emphasise the need for organisations to take a regular 'helicopter view' across services to avoid duplication, check that appropriate linkages are made and ensure that core membership objectives are being met.

3. SURVEY AND FOCUS GROUP RESEARCH – SUMMARY AND CONCLUSIONS

3.1 GENERAL FINDINGS ABOUT HLG

Member demographics

The survey achieved a healthy member return rate of 18.1% with a wide spread of returns and demographic patterns broadly in line with available membership data. However, there was some over-representation of younger age groups and under-representation of older age-groups though this is probably to do with the electronic medium used for communicating with members and for collecting survey data.

The survey provides some useful demographic data to support a fuller understanding of HLG's membership profile and facilitate a segmented approach to the provision of member support services. Perhaps of particular note, nearly 85% of the respondent sample was from the NHS or HE sectors with just 15% from other employment sectors. If this reflects the wider HLG membership composition, it has implications for HLG's service provision and/or for the recruitment of members from other sectors.

Recruitment and retention

In relation to recruitment and retention statistics, survey data indicate that more than 75% of respondents have remained as HLG members for more than 2 years with over half retained as members for more than 5 years. Encouragingly, nearly 20% of respondents have been attracted to join HLG within the past 2 years. However, it is not known how representative this data is of the overall HLG membership. Certainly, CILIP and HLG data indicates declining member numbers (a shrinkage of 27% since 2002) with just 4.3% of HLG members currently under 30. To address long-term shrinkage as older members retire, it will be important to put strategies in place to attract and retain new and younger members.

Data from a small group of lapsed members suggests that lapsing from HLG is more to do with lapsing from CILIP (due to the cost of CILIP membership) than anything to do with disaffection with HLG. Data from both lapsed and non-members (and the focus groups) suggests that there is very low awareness of the direct 'subscribing member' route to HLG members and that awareness of this route might well make membership more attractive and viable for a significant number of health and information library professionals.

Certainly, the research with the small group of potential members suggests that cost is a major issue and that the most attractive membership benefits are 'discounted rates for CPD' and 'awards and bursaries'. The feeling is that the people in this research sample would need to be convinced that, on balance, they would be 'better off' financially from joining HLG – especially as several of the group were already making use of a number of HLG's open-access support services (newsletter, website, HILJ, Core Collections Acquisition Guide). Related to

this, it was suggested in some of the focus groups that the value of the membership package might be enhanced if at least some of HLG's support services were ring-fenced within a member-only password-protected area of the website. This might tip the balance in persuading non-members of the value-for-money benefits of joining HLG.

The survey also elicited a wide range of suggestions for attracting new and younger members. These included practical suggestions around developing incentives, lowering costs, doing more marketing, promotion and outreach, use of social networking applications to appeal to younger potential members and responding to the 'special' information and support needs of people in their early LIS health roles, for example in relation to tailored support services (eg, CPD, networking, mentoring/buddying/shadowing and career development/management). There were also suggestions for strategic change in terms, for example, of broadening HLG's existing target market to include para-professionals, unqualified library staff and those working in a broader range of health-related library areas. The suggestions offered should provide a useful basis for the development of a multi-faceted recruitment and retention strategy.

HLG's unique selling points

'Keeping up-to-date', 'networking' and 'being part of a like-minded community' were most often selected as the main reasons for joining HLG AND remaining as a member of HLG. Open-ended responses indicate that members see these aspects as unique selling points of HLG and, certainly, the 'community' aspect distinguishes HLG from CILIP membership (see the report on the recent CILIP consultation in which it is stated: "*The consultation does not suggest that there is a feeling of being part of a community when a member of CILIP*"). It is important, then, that these are clearly communicated as membership benefits and imperative that these areas are addressed in HLG's strategic objectives and in the member support services provided by HLG.

Around two-thirds of respondents feel that their HLG membership is very or extremely useful in terms of 'keeping up-to-date' while around a third of respondents feel their membership is as useful for 'networking' and 'being part of a like-minded community'. A key objective for HLG would be to drive up member ratings in these areas, particularly in relation to the second and third areas.

Open-ended responses also suggest that HLG's specific focus on the UK health and health libraries sector is seen as an over-arching unique selling point by members. Focus group discussions accord with this and suggest that this USP should drive the focus of member support services and clearly distinguish what HLG offers compared with other LIS membership organisations (including CILIP).

Member use of HLG's support services

Over 90% of respondents make use of HLG's newsletter while more than two thirds use HLG's website and the Health Information and Libraries Journal. Clearly, these are key information channels deserving of

significant HLG resource. In relation to a number of other support areas (eg, HLG's international activities), there were significant percentages of respondents unaware of what HLG offers. These areas need additional marketing as member benefits.

In relation to the vast majority of support areas, over three-quarters of those making ratings gave ratings of good, very good or excellent – with *the Health Information and Libraries Journal*, *the Core Collection* and *HLG events* rated particularly highly. Slightly lower percentages of members gave such high ratings to *Representing members' interests* and *Our international activities* suggesting these areas may require attention if only in terms of better communicating these activities and the associated potential benefits to members.

Satisfaction with HLG

In total, some 73.5% of members rated their satisfaction with HLG as *good*, *very good* or *excellent*. Just 2.5% gave a *poor* rating. These figures are similar to those obtained in the 2002 HLG membership survey where around 2% gave a poor rating and 75% gave a good or better rating (note, though, that a 4 rather than 5-point scale was used in the 2002 survey). A different scale again was used for the 2006 HLG survey but as far as comparison is possible, the present survey shows a reduction in the percentage of *poor* ratings but also a reduction in the percentage of *very good* and *excellent* ratings. However, given the differences in the scales used it is difficult to determine the significance of these findings.

Never-the-less, it is perhaps encouraging, in the present survey, that nearly a quarter of members rated their satisfaction with HLG as *very good* or *excellent*. However, it should also be noted there is ample scope for improvement with another quarter of members giving ratings of *poor* or *fair*.

3.2 PROFESSIONAL DEVELOPMENT FINDINGS

Value placed on professional development

The vast majority of survey respondents place a very high value on professional development with 86% of ratings made in the top quadrant of a 9-point rating scale. However, there is a feeling that employers place less value on professional development – although the average rating still lies within the top third of the rating scale.

Focus group discussions suggest that achieving a positive shift in the value employers place on professional development requires action in a number of areas, for example, promoting the value of the LIS sector, helping members make a business case for their professional development, engaging with competency frameworks which employers already accept and understand (eg, the Knowledge and Skills Framework within the NHS) and possibly developing a simple competency framework or list of recommended competencies and professional development activities which members can refer to in discussions with their employers.

Professional development activities

The survey data indicates that respondents are engaging in a wide range of professional development activities with background reading, study days/courses, e-discussion and committee work as the most common activities undertaken – with some 60% to 85% of respondents engaging in such activities. On-line learning and library visits are also quite popular with 52% and 45% of respondents respectively engaged in these activities. Just 17% of respondents engaged in coaching/mentoring, 7% in shadowing and 4% in job swap or secondment. Overall, the figures indicate healthy engagement in a range of professional development but also suggest there is still relatively low take-up of a range of activities that might address the time and cost issues, often identified as key barriers to engaging in professional development.

In terms of respondents' priorities for the coming year, formal courses/study days are near the top of the list though a significant percentage of respondents included 'low-cost' activities such as *background reading, e-networking, committee-work, and informal learning and reflection*. Never-the-less, there are a range of other relatively low-cost activities (such as *mentoring, shadowing, secondment, deputising, etc.*) which were rarely flagged as priorities. Professional development goals might be well-served by further promotion of these as professional development activities together with the provision of support to help members identify appropriate opportunities in these areas.

Help with the process of professional development

Approximately 40% or more of respondents would like help with one or more aspects of professional development. Aspects attracting the most 'votes' were *signposting, identifying appropriate contacts* and *considering options*. Focus groups suggestions for addressing these aspects included the development of a skills swap/time bank facility so that members could call on each other for help with professional development, advice and contacts; the facilitation of mentoring (or 'mini-mentoring' with a health focus) and shadowing schemes; and the development of a network of 'Professional Development Champions' who could be called on to give help and advice on professional development at the local level.

In relation to the remaining help aspects, the general feeling of focus group participants was that *reflecting on learning* and *identifying professional development needs* were perhaps better placed with the individual and their employer while help with *recording and documenting professional development* (such as an electronic portfolio system) might lie within CILIP's remit. Never-the-less, it was suggested that HLG could play a facilitatory role in these areas through the provision on its website of checklists, decision and review tools and various proforma to support the professional development process.

Barriers to professional development

Many respondents flagged cost and time as significant barriers to professional development, particularly for those in more remote locations

where the time/cost investment to attend a professional development event may be quite considerable. Addressing different aspects of these barriers was said to involve a variety of initiatives such as lower cost events, on-site training, local/regional professional development events, delivery of a central professional development programme through the regions, professional development 'roadshows', bursaries to 'cascade' learning, e-learning approaches and careful consideration of the timing and location of events to minimise time, travel and subsistence costs.

However, the cost/time barrier may be less of an issue where clear benefit to a member's organisation can be demonstrated. Therefore, members might profit from some help with 'making a business case' for specific professional development activities and from the provision of some kind of competency framework or checklist which they could use to support their business case. Where frameworks already exist (eg, the Knowledge and Skills Framework within the NHS), professional development activities which 'key in' to these frameworks would be helpful for members in persuading employers of the value of engaging in a particular professional development activity.

More generally, the cost/time issue may be symptomatic of a more deep-seated problem in the form of a lack of understanding and valuing of the LIS sector at the higher levels of members' organisations. Addressing this may involve promotion of the value of the sector, the development of a (simple) competency framework for professionals working in the LIS sector and discussions with employers to achieve a shared understanding of the competency needs, a belief in the benefits of professional development and support for members' in pursuing professional development goals. Such initiatives might require a collaborative approach between CILIP, HLG, the Career Development Group and perhaps other partners.

How HLG might help in supporting members to achieve professional development goals

Members identified a wide range of ways in which HGL could help them achieve their professional development goals. Perhaps not surprisingly, many of the suggestions were to do with addressing the time/cost barrier: more use of e-tools to deliver professional development, more affordable/free professional development events, improving accessibility through local/regional coverage and facilitation of mentoring/shadowing and peer support schemes. The conference delegates also highlighted HLG's website professional development resources as a priority area for attention while at least one of the focus groups felt that promoting the sector was crucial as a means of addressing the underlying barrier highlighted in the section above. Taken together, the survey, conference and focus group findings provide an agenda and guidance as to member priorities for development in this support area.

Professional development directions

In terms of member demand for future HLG professional development events and support strands, management, leadership and human resource skills were most often mentioned followed by searching skills, web and IT skills/issues and coaching, mentoring, shadowing and job-swap. However,

the list of 'wants' was quite extensive indicating the diversity in members' professional development needs and interests. It seems likely that some of the development areas might lend themselves to on-line learning approaches while others (such as transferable skills) might be addressed through existing on-line modules or classroom-based workshops. Still other areas may be addressed through other approaches to professional development or via partnerships and collaboration with other LIS membership organisations and professional development providers (including CILIP). Given HLG's health niche, it will be important to decide which development areas may be best addressed in a health-related context and which might be better addressed by other providers.

3.3 CROSS-CUTTING TOPICS AND THEMES

The research suggested a number of cross-cutting topics and themes, often touched on in the survey work but then discussed more fully in the focus groups:

HLG focus and approach

In the survey, HLG's 'health' and 'health-related' focus was identified as an overarching unique selling point. The feeling of the focus groups was that this should be at the forefront of HLG's strategic planning so that, for example, rather than duplicating any of CILIP's member services, HLG should be 'shadowing' CILIP in adding health-related aspects to existing provision, for example, tailoring CILIP's mentoring scheme specifically for health library and information professionals. This approach was felt to be particularly important for professional development courses and study day provision where it was felt that HLG should avoid duplication of professional development on offer from other providers, instead seeking to become the 'experts in the field' for health-related LIS professional development provision.

Partnerships and collaboration

The development of partnerships and collaboration was mentioned in some of the open-ended survey responses and repeatedly suggested in the focus groups as a means of extending HLG's reach and adding value to its member support provision. Furthermore, the focus groups indicated there might be interest from other health library and information organisations in exploring possible linkages.

Networking

The research indicates that networking widely across people working in the health-related LIS sector is another key unique selling point for HLG. Members see real value in making connections and there is a call for a broad range of networking opportunities. Suggestions for adding to HLG's current networking portfolio include discussion/support forums (eg for professional development issues), social events, facilitation of local networking, use of social networking technology and extension of networking links through expanding the membership profile and hosting

events to attract people working in health-related fields but outside HLG's traditional membership groups.

Resources

The survey data suggest there is member demand for a broad range of resources to be made available on the website to support professional development. Data from conference participants suggest this should be one of HLG's top priorities for helping members with their professional development and there was some feeling from focus groups that this could be 'an easy win' for HLG. A wide range of suggestions for content included tools for assessing, planning, recording and reflecting on professional development, factsheets, research papers, presentations, tutorials, e-learning modules, podcasts, vodcasts, databanks, a searchable calendar of professional development opportunities together with signposting to other resources, learning repositories and recommended links. Clearly, action in this area would also relate back to another of HLG's unique selling points – that of keeping members up-to-date.

A balanced portfolio of professional development opportunities

Within the focus groups there was some discussion that whilst HLG needs to try to tackle time/cost barriers to members engaging in professional development through the provision of more affordable local/regional professional development events and e-learning opportunities (backed up with a range of resources on the HLG website), there is a need to balance this with occasional 'unique', 'exceptional', 'high-profile', 'inspiring' events which, while costly, might never-the-less prove popular and be considered as good use of time and good value for money. The suggestion is that HLG seek to achieve a **balanced portfolio** of professional development opportunities to address the diversity of membership and membership needs.

4. RECOMMENDATIONS

Clearly, recommendations will need to be carefully considered within the context in which HLG operates (particularly the fact that HLG is run by a committee of volunteers). However, based solely on the research findings, it is recommended that HLG:

4.1 HLG FOCUS & COMMITTEE STRUCTURE

1. Reaffirms its health niche and its primary focus on member support, specifically in relation to the professional development of its members.
2. Reviews the structure of its committee and the roles of committee members to ensure that the committee is optimally structured to support the professional development needs of members.
3. Ensures, as far as possible, that the committee is representative of HLG's membership particularly in terms of having representation from all four countries of the UK and across all sectors.

4.2 RECRUITMENT, RETENTION AND MARKETING STRATEGIES

1. Reviews, segments and markets its membership package to clarify member benefits and enhance perceptions of value-for-money and return-on-investment. Linked to this, HLG may like to consider ring-fencing some of its 'high-value' support services within a member-only password-protected area of its website.
2. Gives particular consideration to developing and marketing attractive tailored membership packages for younger members and those new to a career in the health library and information service.
3. Considers broadening HLG's existing target market to include para-professionals, unqualified library staff and those working in a broader range of health-related library areas.
4. Promotes its 'subscribing member' route to help address member shrinkage and make membership more attractive and viable to a wider potential membership.
5. Develops marketing plans for under used or not well known activities (such as HLG's international work and representing members' interests) and includes these as part of the package of Membership Benefits.

4.3 PROMOTION OF THE SECTOR

1. In partnership with CILIP and others, steps up its role in highlighting the value of Health Library and Information Services and the importance of professional staff in the management and development of these services, therefore making the case for professional development to employers.

4.4 TRACKING AND MEASURING

1. Regularly collects, tracks and reviews membership data to better understand and tailor its member supports services to cater to the diversity of membership backgrounds, needs and preferences.
2. Develops measurable targets in relation to HLG's overall membership profile and its support services and reviews progress against the targets on a regular basis.

4.5 PROFESSIONAL DEVELOPMENT

1. Avoids duplicating support services provided by CILIP, instead focusing opportunities on HLG's niche area of expertise in health and its unique selling points of supporting members in keeping up-to-date, networking and being part of a like-minded community.
2. Develops a repository of professional development information to include signposting people to professional development opportunities, funding streams and contacts and incorporating a database of experts/expertise.
3. Reviews its bursaries provision and looks at the feasibility of offering more professional development related funding, possibly linked to extending the reach of HLG's professional development events.
4. Provides a balanced portfolio of CPD events to include regional/local events, high profile central events and e-learning opportunities.
5. Explores ways of reducing barriers and widening access to professional development activities. This may involve initiatives to address both symptoms and underlying causes. To guide and achieve 'best value', it will be important to measure and evaluate the effectiveness of initiatives.

6. Investigates the development of a simple competency framework or list of competencies for health library and information professionals and/or keys in to existing frameworks (such as the NHS Knowledge and Skills Framework) to assist members in making a business case with their employers for their professional development.
7. Raises member awareness of, and provides support for, 'lower-cost' professional development activities (eg, e-learning, mentoring, shadowing, secondment, deputising).
8. Explores partnerships and collaborations with other LIS membership organisations to extend HLG's reach, its range of membership benefits and member access to professional development opportunities.
9. Develops a range of web-based professional development resources and makes more use of new technologies and social media to enhance interactivity (e.g. mp3 podcasts of conference speeches available on the HLG website) all supported by a professional development discussion forum. However access to particular websites and web tools may be a problem for some members and this access barrier will need to be explored and addressed.
10. Facilitates informal local/regional networking opportunities providing opportunities for members to meet with each other and share knowledge, skills and experiences.

Additional potential recommendations may be found throughout section 2 of this report.

5. NEXT STEPS

In taking this project forward, it is suggested that:

1. The full suite of reports is distributed to committee members for comment.
2. A summary report is issued to HLG members with the promise of an action plan later in the year.
3. The reports and recommendations are considered and taken forward by an all committee away day or a small task group of committee members with a target to report back to the December committee meeting with a fully budgeted plan with SMARTER recommendations.
4. The report and recommendations are considered alongside the findings of work commissioned by CILIP, detailed in the report: "Defining our professional future".
5. The recommendations are cross-referenced with what is already planned as part of HLG's current business planning schedule and incorporated into HLG's future business plan.
6. Consideration is given to the funding of a Development Officer post to take forward this and related HLG activities.
7. Consideration is given to how the research outputs might be used to raise HLG's profile and develop relationships and partnerships with other LIS membership organisations.
8. Consideration is given to further analysis of the research dataset to look at sub-group comparisons and sub-group perspectives on professional development needs.

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