REGIONAL ACADEMIC LIBRARY AND INFORMATION TRAINING
CONSORTIA IN THE UNITED KINGDOM AND IRELAND: A MODEL
FOR SUCCESS

Dr Jean Yeoh
Head of Corporate Services,
King’s College London, Strand,
London WC2R 2LS. UK
jean.yeoh@kcl.ac.uk

Abstract
Training provision through consortia has a substantial track record in the United
Kingdom since their emergence in the 1970’s. Since then training consortia have
reconfigured and reinvented themselves in various ways and still remain a major
force. Brief reference will be made to the recent history of training consortia. The
paper will then largely focus on an overview of current consortia training and
development activity in the higher education information sector. Consortia activity
will be located in the context of current staff support frameworks and current trends in
staff development and workplace learning.
CPD25, the staff development and training group for the M25 Consortium of
Academic Libraries, grew out of a merger between two smaller associations following
an extensive review of training and development for academic libraries in the London
region. Some of the challenges facing training consortia will also be considered
through an analysis of CPD25. These include funding models, charging mechanisms,
organisational structures, administrative support operations, relationship to the parent
consortium, competition, marketing and the evaluation of effectiveness. Finally,
consideration will be given to factors which are likely to influence the future direction
of academic consortia, including a new UK professional framework and the
widespread introduction of virtual learning environments in higher education

Introduction
This paper will examine the current state of regional academic training and
development consortia in the United Kingdom (UK) and Ireland, considering some of the
challenges currently faced to ensure their continuing relevance and survival in the 21st
century. There are also a number of well-established cross-sectoral training consortia
incorporating various configurations of academic libraries, public libraries, health libraries
(NHS) libraries and others. However the main focus of this paper will be on academic library
consortia. UK academic library consortia typically include higher education institutions,
specialist research organisations and national libraries.

The varied range and style of academic consortia that have developed to support the
training needs of information staff in academic library and information services will be also
considered. CPD25, which provides training for M25 Consortium Academic Libraries, was
formed in 2002. Some of the issues that were considered when it was established, and in its
current development, will be used to focus on key challenges faced to differing degrees by all
academic consortia. Developing and new and areas of activity for training consortia will be
identified. Lastly the paper will reflect on the transferability of such models in the
international context identifying potential criteria for success.
Staff development in UK academic libraries

The most recent overview of development activity in the UK academic sector was conducted by CPD25 in 2004. The survey found that staff development is largely strategically managed by library services within a structured and supportive framework. This evidence of widespread commitment at the strategic level is supported by a formal staff development infrastructure. Characteristics of development programmes included formal, written training policies, annual training plans, appraisal and annual review processes. Examples of training policies in academic libraries can be seen in a collection previously compiled by Murray and Oldroyd. The CPD25 survey found that development activities were usually co-ordinated by a designated member of staff, often in conjunction with staff development committees. Most importantly the survey reported that continuing development is regarded as a priority at the highest level with explicit commitments documented in library strategic plans.

A large majority of university library services reported an increase in training and development activity over the previous five years. A number of reasons were cited for this including much more explicit emphasis on staff development in strategic plans. Training and development is also closely linked to organisational need and other planning goals. The use of external schemes to validate staff support processes, such as Investors in People, are also cited by some as a factor in increasing activity.

Other influences on increasing levels of activity stem from major organisational restructuring, increasing involvement of information staff in teaching and learning programmes, engagement with virtual learning environments and legal compliance concerns. Specific compliance issues related to support for disabled users, freedom of information and data protection legislation. In addition to attendance at external conferences, visits and meetings organisations commission in house trainers for internal events. Some services made use of identified training hours, away days and annual closure days to ensure that staff had time for updating.

Staff training provision

There is a rich and extensive range of organisations providing library staff development activities in the UK, demonstrating an enormous appetite for continuing professional development. Providers include commercial organisations and individual consultants. In additional national groups such as the Society of College National and University Libraries (SCONUL) take a substantial interest in staff development but their activities tend to complement rather than compete with training consortia. The UK professional body for information staff, the Chartered Institute of Library and Information Professionals (CILIP) has a number of special interest sectoral groups. Many of these provide events without a formal administrative support structure. Academic consortia are working alongside commercial training providers from individual consultants to large companies. Increasingly academic information studies departments are also developing short course portfolios as a way of diversifying and generating additional income. Inevitably there is some duplication of effort but overall there is no evidence of oversupply of training activity.

CILIP also has its own commercial training division. Consortia have a dual relationship with commercial providers. They can be seen as rivals undercutting commercial rates but by acting as commissioning agents they also place substantial business with commercial operators. Unlike regional academic consortia CILIP and other commercial providers operate on a national basis and recruit course participants from across the whole information sector.
Academic library consortia

A cademic training groups are often, but not always, a subgroup of consortia groupings that have come together with the larger, overarching aim of improving the delivery of services to users. Other training groups may have a more independent relationship within the confines of robust communications mechanisms. The specific ways in which consortia improve the delivery of services to users vary and include collaborative procurement of products and services, influencing professional and government policy, promoting cross domain and cross sectoral collaboration, sharing experience and improving access for users. Staff development and training is frequently defined as an important aim of these consortia.

There has been a trend towards enlargement of consortia. For example, two urban consortia based around the Liverpool and Manchester regions merged to form a new consortium called NoWAL (North West Academic Libraries). The M25 Consortium has expanded it boundaries drawing on institutions well beyond its original London base. These mergers provide an expanded critical mass of library staff opening up new possibilities for training consortia.

History of co-operative training organisations

British training co-operatives largely emerged during the 1970’s and have played an important role as training providers since then. Since then some have survived more or less in their original form, other co-operatives have died and others have developed afresh. In a recent review Philippa Dolphin refers to a resurgence of a new breed of academic library consortia in the UK in the early 1990’s stimulated by an increase in student numbers and by momentum generated at national level towards collaborative working.

Training consortia: the UK picture

There are a range of current models of training consortia reflecting geographic issues, historical precedents, and local needs. Some have dispersed memberships and others are based around large urban populations. The type and range of training provision varies between consortia. The following brief summary will highlight the characteristics of some specific consortia to illustrate differing approaches rather than provide a comprehensive overview of all consortia.

North West Academic Libraries (NoWAL) was founded in 2000 from a merger between two smaller groups and is a consortium of around fourteen UK university and college libraries in the North West of England. The NoWAL programme features a well-established externally validated certification scheme for para-professionals called CLIP (Certificate in Library and Information Practice). CLIP is based around gaining the required number of credits from classroom and work-based learning. An expanding range of CLIP units is being developed, some of which are aimed at professional staff who want to upgrade skills in specific areas. Other short training events are rotated at venues around the member libraries. NoWAL is also piloting a job-shadowing scheme and operates relatively informal exchange of experience events on topics of current interest. The training arm of NoWAL benefits from the services of paid administrative support. Such support is crucial to the success of CLIP, the formal qualification scheme for para-professionals.
Scottish Academic Libraries Co-operative Training Group (SALCTG)\(^9\), established in 1986, still retains its an original core membership of all Scottish higher education institutions, but membership now also includes university libraries in the north east of England and in Ireland. The remit of this group is described as “wide-ranging and permissive” with a genuinely co-operative and egalitarian style.\(^10\) There is a small annual membership fee that allows attendance at training events at a reduced cost.

Academic and National Library Training Co-operative (ANLTC\(^11\)) was established in 1995, modelling itself on the success of SALCTG\(^12\) and still maintains co-operative links with the Scottish group. This training co-operative has twelve member institutions including National Library and university libraries in the Republic of Ireland, Northern Ireland. Members are geographically dispersed and events are rotated around the institutions. ANLTC runs a programme of events and administers a Library Assistant bursary for professional development purposes.

**The CPD25 training model**

This paper will now turn to a detailed examination of CPD25 as an example of a functioning training consortium.\(^13\) As the largest academic library training consortia in the UK, CPD25 is not necessarily typical. However in many respects it faces similar challenges to those experienced by other consortia. CPD25 was created in August 2002 from two smaller training co-operatives to provide staff development support for academic libraries within the M25 Consortium. Prior to the formation of CPD25 an extensive review of existing consortia was undertaken to enable best practice to be built in to the new structure. The M25 Consortium membership stretches in all directions well beyond the confines of the infamous M25 motorway encircling London after which the Consortium was named. The furthest institution is located at Brighton on the South Coast around 75 kilometres from the centre of London. There are excellent public transport links to central London, even for institutions based outside the boundary of the M25 motorway.

CPD25 currently provides training for around 50 university and research services. The M25 consortium is a subscription based body and consortium members pay an additional annual subscription to CPD25. There is no opt out from either subscriptions and members cannot subscribe to the M25 without subscribing to CPD25. Member subscriptions fund the salary costs of the CPD25 Administrator and events are charged on a cost recovery basis. That is, events are charged at a rate that covers the costs of speakers, catering and venues and a small surplus. The subscription payment means commitment to maximising use of CPD25 rather than other providers in order to obtain best value for investment.

**Events programmes**

The programme of events is a mixture of sharing of experience with expertise provided by specialists and senior staff from within the Consortium, and the provision of courses run by commercial training providers. Events range from half day or whole day seminars to short programmes. Commercial providers are used particularly for legal compliance issues where it is crucial that information is factually correct. In the current year of operation examples of CPD 25 events include three-day programmes for new managers and four-day ‘pick and mix’ programmes for senior managers, short breakfast briefings for senior staff and a programme series on the teaching of information literacy skills. There are three main strands in the events programme:

- visits to information services,
- chartership programme – the chartership programme is a series of nine workshops,
• to support staff who are seeking Chartered membership of CILIP,
• seminars, workshops, short courses aimed at all levels of staff.

Activity levels have increased in the first two years of operation and Figure One below shows an increase in the number of events held and a 31% increase in the number of participants attending events. It is likely that CPD25 has achieved maximum capacity in terms of event provision based on current support arrangements and it will need to give serious consideration to future directions through its business planning processes.

**Figure 1 CPD25 activity statistics 2002-3 and 2003-4**

<table>
<thead>
<tr>
<th></th>
<th>Number of participants</th>
<th>Number of events held</th>
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<tr>
<td></td>
<td>2002-3</td>
<td>2003-4</td>
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<tr>
<td>Visits</td>
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<td>183</td>
</tr>
<tr>
<td>Chartership</td>
<td>185</td>
<td>220</td>
</tr>
<tr>
<td>Seminars, workshops etc</td>
<td>683</td>
<td>970</td>
</tr>
<tr>
<td>Totals</td>
<td>1048</td>
<td>1373</td>
</tr>
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</table>

The structure of CPD25

In order to support a relatively large programme of events a formal structure is used to support CPD25 operations. A Steering Group leads CPD25’s programme and five theme-based Task Groups are responsible for planning and delivering a range of events towards the whole programme. The Steering Group consists of the Convenor of CPD25 and the Convenors of the five Task Groups. Each Task Group has 8 -10 members, is charged with a specific remit for a subject or theme area (Figure 2) and is responsible for planning and implementing events in their area. A full time Administrator is paid from consortium member subscriptions that are calculated to cover the Administrator’s employment costs.

Task groups are responsible for defining topic areas their, event content and identifying speakers. Inevitably there are some event topics that cross more than one Task Group theme area and the Administrator services all Task Group meetings and can quickly identify potential duplication of effort. The Administrator is responsible for identifying venues, taking bookings, maintaining financial records and attending all events to ensure smooth running on the day. Paid administrative support removes some of the burden and uncertainty around voluntary support but the necessity of substantial input from voluntary effort of individual library staff members remains. CPD25 has a fairly complex structure (Figure 2) reflecting the need to deliver a relatively large annual programme.
Task group members are drawn from the staff of consortium libraries and CPD25 has between 45–50 people who have an interest in staff development, specialist expertise or simply an enthusiasm to participate. Care is taken to ensure that membership reflects the range and geographic dispersal of members, size of member institution and that there is a mix of both junior and senior level of staff to ensure that strategic development issues are fully considered. Staff turnover at more junior levels in particular means that there is a constant effort to maintain task group numbers and recruit new members. In general this has not proved difficult largely because CPD25 is regarded as a successful operation to be associated with.

**Challenges**

The paper will now turn to address the main challenges facing regional academic training consortia by considering some of the issues faced by CPD25, options reviewed and solutions identified.

**Funding models and event charging mechanisms:** CPD25 was created from a merger of two smaller organisations that operated different financial support mechanisms. The London University Libraries Staff Training Group that had been in existence for a number of years charged a subscription to member libraries to apply for the costs of a part-time administrator and events are charged on a cost recovery basis. The M25 Consortium Career Development Group largely operated on a cost recovery basis only with no formal administrative support. The University of London ‘mixed economy’ model of subscription event charge and was seen to provide a robust and viable mechanism that would transfer to the proposed larger scale operation of CPD25.

Calculating event charges is a relatively straightforward process combining a number of standard factors. Core component costs of events include speakers, catering and venue costs essential although these can vary enormously. For example, event speakers may themselves be Consortium members and therefore do not charge speaker fees. Event costs are relatively low if administration is excluded. Conversely some areas of activity require high cost speakers. This is particularly true in relation to legal compliance issues such as freedom of information, disability, data protection, and intellectual property rights. Specialist experts,
often with a legal background are usually more costly causing the overall event cost to rise. CPD25 has tackled the issue of event charging for participants by setting the low cost events at a pricing level that reflects the value of the event rather than a true minimum charge. Surplus income generated from low cost events is used to subsidise high cost events. A modest surplus is retained as contingency as CPD25 is expected to be self-sufficient and cannot call on the M25 consortium for additional funds. CPD25 operates as a semi-commercial provider in that it must be self-sufficient but retains the flexibility to divert funds to other areas of staff development support. For example this year the organisation has funded a travel grant for attendance at this conference and in 2004 it conducted a national survey of training activity. Spare places are advertised externally to non-subscribers and charged at a significantly higher rate to include a notional subscription element.

Income generation is not a significant part of the CPD25 remit. However CPD25 has been commissioned by the London Metropolitan Network (LMN) to provide administrative support for a specified number of training events per year. LMN is one of a number of regional broadband metropolitan area networks providing connectivity to the UK’s national academic network. It provides links to over one hundred higher education and further education institutions in the London region. This additional income enables CPD25 to allocate funds to broader activities. This relationship has a number of valuable synergies. Events are easily marketed to both library and computing staff allowing for greater sharing and understanding in member institutions. This is vital as some CPD25 member services are converged and computing and library staff must work increasingly closely to deliver electronic information services.

Organisational structure and administrative support: As a large training consortium CPD25 has a formal organisational structure of necessity. While much work can be conducted by email CPD25 Task Groups meet at least twice yearly and the Steering group meets on a quarterly basis. An annual plenary session is held for all steering group and task group members to come together. Event planning has to be undertaken in advance and while there is room for flexibility, smaller and looser consortium structures may be able to react more quickly to unexpected surges of demand. CPD25 programmes are planned around the UK university academic year running from August to July. The outline programme for the coming year is usually drafted by April of the preceding year. It is regarded as vital to enable individual institutions to take CPD25 programmes into account when developing internal training plans.

High quality administrative support has been crucial for CPD25 to maintain the scale of operation and to ensure that events are organised effectively. The preferred model of recruitment is by secondment from among member libraries. The post itself is regarded as providing a career development opportunity for applicants. This arrangement contributes to a strong sense of ownership among members. The first administrator was recruited from one of the more distant libraries and has assisted in raising the profile of CPD25 in her home library. With or without administrative support, all consortia remain totally dependent on considerable input from enthusiastic and energetic consortium members whose primary loyalty must be to their own workplace. This is both a strength and weakness for all consortia.

Relationship to the M25 Consortium: The CPD25 Convenor is a co-opted member of the M25 Consortium Steering Group and present regular reports of activity. CPD25 produces a biennial business plan for approval by the Consortium and also reports progress at twice yearly general consortium meetings. This enables members to be consulted fully about plans and to provide feedback on activity. Good communications are vital to ensure that training group aims are fully integrated into overall consortium goals.
Competition:- Academic consortia work alongside commercial training providers including individual consultants and large companies. The UK professional body for information staff, the Chartered Institute of Library and Information Professionals (CILIP) has its own commercial training arm. Consortia have a dual relationship with commercial providers. They can be seen as rivals undercutting commercial rates but they by acting as commissioning agents they also place business with commercial operators. However CILIP and other commercial providers operate on a national basis and recruit course participants across the whole information sector.

CPD25 does not seek to compete with other training providers and plans events solely on the basis of recruiting participants from within the Consortium. It will advertise more widely on email discussion lists as a last resort if there are spare places in order to cover costs. To date it has rarely needed to advertise beyond the consortium membership area although it does have informal links with other parts of the information sector in the London region such as health service and public sector libraries. Nevertheless consortia must keep a watching brief on other providers to avoid unnecessary duplication.

Evaluation of effectiveness and the value of membership: Both small institutions with tight budgets and large institutions with correspondingly higher staff training budgets which enable them to fund extensive in-house programmes have to justify additional expenditure on training consortia. Library services in some of the larger universities with large staffs are able to provide comprehensive in-house training programmes with sufficient staff to make the commissioning of external commercial trainers a viable option. They may feel that membership of a co-operative organisation is irrelevant. While it is true that some training programmes can be run in-house most institutions recognise the value of the opportunities for networking, sharing expertise and developing an outward looking approach.

Experience from CPD25 suggests that twin approaches are perfectly compatible. There are several large library services within CPD25 that possess both the resources and staffing levels sufficient to justify the provision of extensive internal training programmes. However they remain committed to CPD25 membership. In order to retain that commitment, members need to feel a sense of ownership and involvement. Both small and large institutions need to feel that they are equally valued and their differing needs are met. CPD25 membership includes the British Library, large institutions such as Middlesex University and smaller research libraries such as the Courtauld Institute of Art. This sense of community belonging can be more difficult to achieve in large, formally structured consortia, but CPD25 achieves engagement by ensuring that a wide spectrum of the membership is involved in its Task Groups. Task Group members frequently act as ambassadors and advocates for CPD25 within their own institutions.

Evaluating the value and impact of development activities is a challenging issue, both at the individual institutional level and at the broader consortium level. Training is regarded as important and rates highly in at strategic planning level yet the academic sector is not easily able to define the organisational impact of its training and development investment. As in most training organisations, CPD25 requests that participants to complete event evaluation forms. It has considered commissioning an external evaluation of the impact of CPD25 on its member organisations. However, the M25 Consortium feels that while CPD25 is perceived to be successful in meeting member needs and providing events that are popular and well attended, any surplus income should be ploughed back into the events programme.

Writing about training co-operatives twenty five years ago Alan MacDougall noted that "if groups are unable to innovate...and unwilling significantly to rethink their aims, objectives and priorities, then there is a very real danger of complacency and drift." The pressure of activity associated with developing and sustaining a substantial events programme...
can mean that groups fail to develop and change. The events programme can be seen as the chief tangible performance indicator of a successful consortium and therefore hinder a more strategic approach. This pitfall can be avoided by embedding a structured approach to business planning and taking time to consider the longer view.

**Marketing:** A cademic training consortia, with their clearly defined target audience, the staffs of member institutions do not face the marketing issues of commercial training organisations. Most contact to members is by email and by the web. Nonetheless, such groups need to develop a ‘product’ or programme of events that meets members needs in order to remain in robust health. The name ‘CPD25’ has been successful in providing the training group with almost instant brand recognition, combining its core purpose and its connection with the umbrella consortium is a single memorable mnemonic.

**Future directions**

In April 2004 CILIP introduced a new Framework of Qualifications although the impact of this has yet to be fully realised. The current award of Chartership, following the completion of an undergraduate or post-graduate library and information science degree after a period of practice and an evaluative formal submission to CILIP, will continue to exist. Also continuing is the award of Fellowship for which applicants must demonstrate their contribution to the wider information profession.

New awards of Certification for para-professionals and a Revalidation scheme for Chartered members have been launched by CILIP in April this year. The Revalidation scheme is currently voluntary and Chartered members can assure their CPD by the submission of a portfolio of evidence every three years. Employer support will be important for the success of the revalidation scheme. The longer-term impact of these schemes has yet to be fully realised.

The last few years have seen rapid growth in the use of virtual learning environments in the UK higher education. There is potential role for consortia in the commissioning of high quality electronic training materials. There is also potential for more linkage or integration with training consortia from other parts of the information sector. This would need carefully managing to avoid diluting the advantages of single sector working.

With their considerable experience of commissioning trainers and consultants, consortia can act as repositories of good practice and contacts. Larger consortia may also have sufficient impact to influence national policy initiatives. Regional consortia can certainly make a contribution to regional workforce development issues. Academic consortia could develop better links or even integration with training consortia from other parts of the information sector, such as public, health and commercial library services. This would need careful management to avoid diluting the purpose of single sector working and avoid the provision of development activities that fail to meet needs in terms of focus and timing.

**Transferability of UK training consortia models**

Consortia of course are an international phenomenon. A survey of regional library systems in Ohio in the United States found that continuing education was an important element for member libraries. In a review of consortia in India resource sharing is seen as the driving force for consortia and the author makes no reference to training and development. However while resource sharing may be the primary reason for establishing consortia a recognition of the value of sharing expertise can lead naturally to development activities as a second phase of consortia development.

Many training consortia began life as semi-formal opportunities to exchange experience and expertise which developing into organised programmes of events. In the
international context the following are all factors that will influence the type and form of training consortia:

- geography,
- critical mass of staff/optimum size,
- transport links,
- mutual interest,
- commitment to staff development at individual and organisational level,
- leadership and enthusiasm.

However there is no single model that is more effective than others are. Requirements for a successful training consortium are most heavily dependent on a recognition of the value of training and development within member organisations, a community of common interest and strong leadership and determination.

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