What type of leader am I?: a training needs analysis of health library and information managers

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Abstract

Background: Leadership is a necessary facet of professional practice for health library and information managers (HLIMs). Several training needs analyses (TNA) in the health library and information services field have been conducted in recent years, all identifying a need for professional development in leadership skills. However, these previous TNAs have not focused on specific elements of leadership skills required by health library and information managers.

Objectives: The National Library for Health (NLH) commissioned the School of Health and Related Research (ScHARR) at the University of Sheffield to conduct a TNA where HLIMs assess their current leadership skills and identify any future development needs in this area. The results would inform a programme of influencing skills workshops.

Methods: HLIMs in the UK were invited to complete a self-assessment online questionnaire. The questionnaire utilised items from Manning and Robertson’s Influencing Skills Style Profile (ISSP). This allowed the results to be characterised by influencing ‘style’.

Results: HLIMs considered themselves to have strengths in the leadership areas of influencing, negotiating, managing change and delivering presentations to decision-makers. They identified significant development needs in communicating with stakeholders, conflict resolution, using body language and being assertive. Most HLIMs demonstrated two collaborative styles identified by the ISSP, namely strategic collaborator and opportunistic collaborator.

Conclusions: In difficult times, HLIMs may need to adapt to more of an ‘opportunistic-battler’ influencing style. It is important that HLIMs not only assess their own leadership skills but also that they take opportunities to employ 360° feedback, comprising assessment from subordinates, peers and supervisors.

Keywords: health science, leadership, librarians, librarianship, library and information professionals, professional development, surveys, United Kingdom (UK).

Key Messages

Implications for Practice

• In addition to self-assessment, health library and information managers should consider employing 360° feedback to assess their leadership skills.
• Health library and information managers should seek opportunities to improve their self-awareness and perception of their leadership skills.
• While collaborative styles are currently much in evidence, HLIMs may need to adopt ‘opportunistic-battler’ characteristics in response to the challenging economic environment.

Implications for Policy

• Leadership skills remain an under-reported area of training needs for health library and information professionals.
Continuing professional development programmes for health library and information professionals should address a need for leadership skills.
Opportunities for mentoring and coaching should also be provided.

Background

As health librarians face the challenge of working in ever more demanding environments, an increasing premium is being placed on skills associated with strategic direction, motivation of teams and securing the survival of one’s service. The notion of leadership, and its associated skills, is frequently debated in the library and information literature, particularly in the context of health library service management. Leadership is increasingly recognised as a necessary facet of professional practice. For example in 2008, Rossall and colleagues highlighted a need for leadership in developing library research capacity. Leadership also figures prominently in the findings of training needs analyses (for example the neXus census and the Health Libraries Australia research project) and in prioritisation exercises for research (for example, the recent prioritisation of Swedish library research needs). However, it remains unclear the extent to which this reflects a genuine perception of need or whether this simply represents a prescription for what ‘would be good for my colleagues’. Furthermore, a vicious cycle may exist whereby a need for library leadership will not be appreciated by other professions who have been disproportionately influenced by an apparent absence of observable library leadership roles.

Leadership is notoriously difficult to define and means different things to different people. Over more than a century of research, scholars have attempted to define leadership in terms of individual traits, behaviours, influence over others, role relationships and perceptions of others. Such diversity has resulted in the absence of a definitive skill set, although a variety of competencies are mentioned throughout the literature, including change management, communication skills, negotiating skills, motivational skills and advocacy. In addition, personal attributes are attached to leadership, such as charisma, vision, dedication, empathy and being inspirational. These types of leadership qualities contribute to ‘emotional intelligence’, a phrase coined in 1990. In the current economic climate, values such as reliability, integrity and authenticity are seen as of utmost importance in leaders.

There is also an increasing realisation that leadership represents a contingent set of skills and attributes, heavily dependent on context and not necessarily manifested on a day-to-day basis. Allied to this has been acknowledgement of the critical importance of a leader’s emotional resonance with others. As a result, a clear separation has been engineered between leadership and the domains of management and administration. Furthermore, there is a sense that leadership recognises a direction of travel, embodied in a more strategic perspective, whereas management carries connotations of handling or maintenance.

Within the specific context of the UK National Health Service, the NHS Leadership Qualities Framework groups personal, social and cognitive qualities into three clusters: Personal Qualities, Setting Direction and Delivering the Service. Such qualities and skills are becoming increasingly important in the health library and information field as professionals need to develop new roles including making a case for their service, change management and conflict resolution. Indeed, the job statement that accompanies the NHS Agenda for Change profile for Professional Manager Library Services itemises: ‘Lead on the strategic development and management of a library or knowledge and information service and resources for a multi-organisation or sector’. It further lists job information to support this aim, including business planning, writing and presenting business cases, and justifying plans and processes to stakeholders.

Several programmes have been developed to facilitate the development of leaders from within the library and information profession, both in the UK and internationally. Such a preoccupation is further reflected in past training needs analyses carried out within the field. In 1999, Loughborough University undertook a survey of librarians...
working in the NHS. In this survey, training in leadership received specific mention as one of the required areas of personal skills training, along with such topics as negotiating, strategic planning, conflict resolution, mentoring, fundraising and development. In 2003, Lacey and Booth reviewed the education, training and development of NHS librarians, which included anecdotal suggestions for e-learning priorities, of which leadership was one suggestion. The University of Aberystwyth conducted two training needs analyses in 2004 and 2005. The first aimed to inform training strategies for healthcare library staff in the South Yorkshire Workforce Development Confederation and found that leadership was one of the development priorities for healthcare library staff. The second, a systematic assessment of the training needs of health library staff, synthesised previous studies on training needs of health library staff. Both leadership and strategic planning skills were identified as key training needs.

Objectives

While consensus seems to be emerging from generic training needs analyses that health librarians need training in leadership and related skills, there has never been an analysis of the specific aspects of leadership required by health librarians. Such a gap in analysis led the National Library for Health (NLH) to commission the School of Health and Related Research (ScHARR) at the University of Sheffield to conduct a training needs analysis (TNA) of leadership skills of health library and information managers (HLIMs). The aim was to allow HLIMs to assess their current skills in this area together with any future development needs. This information would feed into a programme of influencing skills workshops, commissioned by the NLH and delivered by an independent facilitator.

Methods

Questionnaire design

The training needs analysis took the form of a self-assessment questionnaire, allowing respondents to assess their own influencing and negotiating skills. The questionnaire was organised into five sections. The first section contained four demographic questions concerning job profile/title, sector and geographical area. The second section focused on ‘How I have managed in the past’ and encouraged respondents to think of instances (critical incidents) from their own recent management experience when responding to a set of statements. This sought to provide a practical context within which to examine the leadership attributes. This variant of the critical incident technique (CIT) encourages respondents to think of actual instances from their own experience when answering questions.

The third section (How I manage generally) asked respondents about their general responses to challenging situations. The fourth section (How I rate my current skills and abilities) examined how respondents feel about their current skills and abilities, and the fifth section (How I would like to develop my interpersonal skills) covered future development.

Sections 2–5 (outlined above) presented versions of questions previously used by the National Library for Health together with statements selected from the Influencing Skills Style Profile (ISSP) by Manning and Robertson. The ISSP consists of four influencing ‘styles’, as shown in Fig. 1, the two-dimensional model of influence.

Responses for these questions could therefore be collated and characterised into ‘styles’ when analysing the results.

For the full questionnaire, see: http://www.library.nhs.uk/nlhdocs/Influencing_skills2008.doc – Appendix 2 National Library for Health Influencing and Negotiating Skills Questionnaire.

Figure 1 Two-dimensional model of influence – the four influencing styles
Questionnaire distribution

The target group for the questionnaire was health library and information managers (HLIMs). The questionnaire utilised Survey Monkey (http://try.surveymonkey.com/), with a Word document version of the questionnaire for those who could not access the online version. The link to and the details of the questionnaire were emailed to the target audience via the NLH-MANAGERS and LIS-MEDICAL Jiscmail distribution lists (http://www.jiscmail.ac.uk/). The survey was live for 3 weeks with responses being collated at the conclusion of this period.

A total of 153 respondents completed the questionnaire. The responses from the questionnaire were collated, subsequently analysed and a report produced for the commissioner (NLH). This article focuses on those leadership skills that HLIMs identified as strengths and those skills they identified as requiring development. The full survey results can be viewed from the NHS Evidence website (formerly NLH): http://www.library.nhs.uk/nlhdocs/Influencing_skills2008.doc.

Results

Demographics

All 153 respondents filled out the details of their job profile and supplied their exact job titles. 129 of the respondents (84.4%) were either a library manager at a single site (47.1%) or a library manager at more than one site (37.3%). 88.3% (n = 135) of respondents were from NHS sites, based either in NHS Trusts (83.7%) or in NHS SHAs (4.6%). Other sizeable representations were from Higher Education (12 respondents) and the National Library for Health (four respondents). Respondents represented all ten strategic health authority catchment areas.

Leadership skills

The questionnaire utilised a self-assessment approach, so results represent health library and information managers’ perceptions of their own attributes. As expected, respondents rated themselves more highly in some areas than others, allowing the team to draw conclusions regarding the key areas where LIS professionals have perceived development needs.

Skills considered perceived strengths

Generally respondents felt most comfortable with influencing and negotiating, particularly when closing negotiations. Responses to the critical incident technique section revealed that 49.3% (n = 69) of respondents were largely satisfied with the outcome in the last instance where they had had to use negotiating skills in their job. Another area of collective strength was in introducing and managing change with 64.5% (n = 89), indicating a largely successful outcome for the last time they had to introduce and manage change. Respondents also felt comfortable in delivering presentations to persuade decision-makers (38.1% n = 51 stated that they are ‘quite comfortable’ with their own current skills in this area). In addition, the largest number of respondents (45.5% n = 61) felt quite comfortable with communicating with the stakeholders for their service. Specific development needs were identified around conflict resolution. The CIT revealed that the majority of respondents (62.9% n = 88) felt that they were largely successful in dealing with potential conflict in comparison with actual conflict, in the latter case 44.3% (n = 58) of respondents felt they were only partly successful.

Skills requiring significant development

Respondents were asked about the extent to which they needed to develop their interpersonal skills and rapport with different groups: managers, colleagues, stakeholders and service users. The majority of respondents indicated that they partly needed to develop their interpersonal skills and rapport with three of these groups (managers, colleagues, service users). However, 52.6% (n = 70) stated that they significantly needed to develop their skills in communicating with the stakeholders for their service. Specific development needs were identified around conflict resolution. The CIT revealed that the majority of respondents (62.9% n = 88) felt that they were largely successful in dealing with potential conflict in comparison with actual conflict, in the latter case 44.3% (n = 58) of respondents felt they were only partly successful. Linked to this is the finding that 35.8% (n = 48)
of respondents felt quite uncomfortable dealing with angry people. Such shortcomings are further noted in responses to the questions about body language – the largest number of respondents (44.9% \( n = 61 \)) felt largely successful interpreting the body language of others rather than in using their own body language to achieve the outcomes they wanted (52.2% \( n = 71 \) indicated they were only partly successful in this area). In addition, approximately half of the respondents (50.7% \( n = 69 \)) felt that they had only limited success with regard to being assertive.

Influencing skills style profile

HLIMs in this survey displayed two dominant styles from the Influencing Skills Style Profile, namely the two collaborative styles (strategic collaborator and opportunistic collaborator). Of these, the strategic collaborator was the overall dominant style with every item scoring over 50%. The opportunistic collaborator also scored consistently high except for the statement ‘I like to respond to a proposal with an immediate counter-proposal’ which only scored 12.5% \( (n = 17) \). Participants were thus comparatively less likely to possess opportunistic, as opposed to strategic, collaborative characteristics. Particularly noticeable is a lack of support for the prevalence of a ‘battler’ style, but even here the strategic approach is favoured over the more spontaneous opportunistic domain.

Areas for development

Based on the results of the questionnaire, the key areas for development are the following:

- Interpersonal skills and rapport, particularly when communicating with stakeholders of the library and information service.
- Skills in conflict resolution, particularly in dealing with angry people.
- Assertive skills.
- Using body language to achieve outcomes.

Discussion

The results of the questionnaire demonstrate the need for HLIMs to develop their leadership skills, particularly with regard to communicating with stakeholders, conflict resolution, dealing with angry people, being assertive and using body language.

NLH influencing skills workshop

Following this questionnaire, the NLH commissioned an Influencing Skills Workshop that took place twelve times during 2009 in a variety of geographical areas. The workshop aimed to enable participants to:

- Have a better understanding of the dynamics of effective influence and negotiation.
- Develop practical strategies for their own use to become more effective leaders, and
- Be more confident in raising their profile, and communicating the benefits of Library and Knowledge Services at a senior level.39

The overall results of the questionnaire, together with specific responses to particular questions, directly influenced the content and delivery of this workshop by an independent facilitator. This information enabled the workshops to focus on the key aspects of leadership as viewed by HLIMs at this time and thus allowed for a more targeted and tailored workshop programme. Participants explored their own communication styles with part of the day focusing on influencing and negotiating styles, as explored in the questionnaire. The afternoon session included a section on ‘Constructive Communications’, which focused on ‘The ‘seven essentials’ for dealing with anger and negativity’ and ‘Non verbal communications’. In addition, delegates brought their own responses to the questionnaire with them to the workshops meaning that their own development needs could be placed at the forefront of their minds, thereby allowing them to maximise their benefit from the day.

A further intended outcome from the workshop was that participants should be able to develop an action plan for ongoing professional and personal development. Such needs could be met in a variety of ways. Evidence from the literature suggests that mentoring is an effective way of developing leadership skills.31,40–42 However, such approaches come with the caveat that mentors must be properly trained in mentoring so as not to pass on ‘bad habits’. The literature also supports coaching techniques, following initial leadership training, particularly from staff in other professions.43
Influencing skills style profile

The results from the questionnaire suggest that HLIMs perceive themselves as more strategic than opportunistic and more a collaborator than a battler in their influencing skills style. Particularly in the current economic climate, it could be argued that it would be propitious to adopt elements of the opportunist-battler style, an observation also reflected in the general leadership literature. A review published in *Strategic Direction* mentions phrases which align to this – ‘talk tough’, ‘open minds – the changing environment should be embraced and opportunities scouted for’ and ‘learning to dance with the unknown’. Berman et al. identify three targets for succeeding in the new economic environment, one of which is ‘exploit opportunities’. Such targets reflect a focus on creativity and innovation in times of recession with library managers needing to look for ‘opportunistic’ alternatives, for example in sources of funding and new ways of low-cost marketing, such as plugging into Web 2.0 and social networking.

The most effective leader is likely to be capable of adopting any of the four ISSP elements depending on the approach the situation requires. Evans and Ward, when discussing influencing tactics, state that ‘Effective leaders make use of multiple factors rather than one or another or alone’. Furthermore, Roberts and Rowley note that the literature on influencing ‘often focuses on techniques that require you to be a kind of chameleon’.

There is a tension present in the literature here, as it is reported that ‘followers’ prefer leaders who are more consistent in their behaviour. Indeed, leaders who are consistent in their actions are perceived as more successful than those who switch between behaviours.

What type of leader are you?

The aforementioned results lead us to reflect on the characteristics of different leadership styles and when they might be appropriate.

**Strategist?** As the label suggests, strategists tend to work to a strategy, carefully planned in advance, and use reason, assertion and partnership to influence others.

**Opportunist?** Located at the opposite end of the scale to the strategist, the opportunist ‘plays it by ear’ reacting to each situation as it develops. In the influencing situation, they tend to respond opportunistically by bringing themselves into favour with the other party and offering an exchange of benefits. This style perhaps has more of a negotiation feel to it embodying elements of the ‘chameleon’ approach described earlier.

**Collaborator?** Collaborators tend to be willing to adapt their position to fit in with the wishes of others. They use partnership, reason, exchange and courting favour to influence others. Manning and Robertson state that ‘they engage collaboratively in a rational partnership with others for the overall good’.

**Battler?** Battlers tend to use coercion and assertion, concentrating on getting across exactly what they want to achieve and the sanctions they are prepared to use if they do not achieve it.

**Bystander or shotgun?** In a 2008 paper, Manning et al. introduce a third dimension to the influencing skills style. This relates to how frequently individuals attempt to influence others, ranging from the ‘bystander’ who engages in relatively few attempts to influence, to the ‘shotgun’ who engages in many more influence attempts. Again it could be argued that in the current economic climate, leaders will have to take a more ‘shotgun’ approach as they make their case for funds.

Limitations

The pragmatic context within which findings from this survey were to be applied, that is to be used in designing a workshop programme, combined with a very short timescale for administration, meant that the team was unable to utilise reminders and methods for promoting completion of the questionnaire. Furthermore, although in theory it might be possible to compute the size of the target population and subsequent response rates from membership of the primary distribution lists used to promote the survey, this did not prove possible because of additional cascades to regional lists, overlaps in membership of lists and a large
proportion of intended recipients not being members of national lists.

As previously mentioned, this questionnaire was designed as a self-assessment tool with responses being limited in that they represent HLIMs’ own perceptions. This leads to consideration of self-awareness, confidence and perception. Highly effective leaders have been found to underrate their own skills of leadership competency\(^5^4\) with ineffective leaders overestimating their leadership ability. Such findings suggest that a more accurate assessment of the current leadership skills of those being surveyed might be obtained using 360° feedback. 360° feedback includes assessment from subordinates, peers, and supervisors as well as from oneself. The NHS has developed a 360° tool\(^5^5\) to compliment the Leadership Qualities Framework, allowing users to set their own target levels for each quality defined in the framework. Furthermore, HLIMs may need to improve their self-confidence and thus change perceptions of themselves as effective leaders.

### Conclusion

Leadership skills have become a necessary element of the HLIM’s toolkit. In increasingly difficult times, HLIMs are required to draw on all elements of the leadership role and may find themselves having to act in a different style to their usual approach, applying aspects of the opportunist, the battler and the shotgun. Awareness is key, and HLIMs should apply 360° feedback to assess their leadership skills, allowing consideration of the areas they need to focus on to lead their library and information service through choppy waters and beyond.

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