



Staff development strategy for institutional success - a reality

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Abstract:

The University of Pretoria' Library Services (UPLS) believes that the strength of its institution is its staff. It has been fortunate to have a staff complement that represents varying expertise, experience, specialisation and qualities. This paper will articulate the reasons why the UPLS has included staff development as a key strategy within its strategic plan. It will further discuss how this strategy is managed, funded and implemented; and to what extent it has succeeded in fostering an environment of innovation and exploration.

This strategy was further informed by the Investors in People benchmark exercise undertaken by the UPLS in 2009. This process and final report highlighted the need to carefully review the way CPD has been understood and managed. As part of the strategic planning process, it was recommended that when strategies are identified the relevant skills sets should also be identified. The impact hereof has been huge.

By deviating from the usual ad hoc approach and adopting this strategic approach to staff development, the UPLS has realised the importance of staff development towards its success and position as a leading academic library nationally and internationally.

INTRODUCTION

The greatest asset of an institution is its human capital. The degree of success it enjoys is contingent upon creating a work environment that acknowledges that every person has a different reason for working and their motivation to be the best stems from being valued for a job well done by those they hold in high esteem. Even in this age of advanced technology, people are still the driving force of every organization. Staff need constant development not only for them to perform their assigned duties to the best of their abilities, but also to educate them; to expose them to new and changing products and services; and to help them advance in their careers. To this end, staff development refers to the processes, programs and activities through which every organization develops, enhances and improves the skills, competencies and overall performance of its employees.

This responsibility usually rests within the Human Resources (HR) department, which typically charts out a workable staff development plan/roadmap comprising training programs and initiatives to align with the corporate objectives and long-term organizational goals. HR team members in conjunction with functional heads devise and develop the relevant staff development programmes. Where a performance management system is in place, the functional head together with the employee will identify development needs and the appropriate level of required intervention.

Emphasis in all staff development programmes is on improving and enhancing skills of employees and making them competitive on all fronts. Many organizations also seek the role of relevant external training agencies, specialized coaches and other consultants to supplement internally-developed staff development programmes. Staff development programmes are highly metrics-driven. The goal is to see measurable improvements in staff performance and overall productivity in the medium-to-long term period. Staff development is a continuous process and involves meticulous and rigorous planning by the HR team and company. To be truly effective, staff development cannot be ad-hoc. It requires strategic planning to ensure that resources, decision-making, and activities are aligned with the goals of the institution.

This paper aims to show how from 2006 staff development has emerged as a critical factor for the success of the University of Pretoria Library Services. The context, policies, processes, strategic alignments, funding, etc that have all contributed to an enabling environment will be discussed.

UNIVERSITY OF PRETORIA (UP)

The University of Pretoria (www.up.ac.za) is a leading research university in South Africa and one of the largest in the country. It has six campuses and several sites of operation, such as the Steve Biko Academic Hospital. The University offers more than 1800 academic programmes in two of the official languages, Afrikaans and English, through its nine faculties and a business school, namely, Economic and Management Sciences; Education; Engineering, Built Environment and Information Technology; Health Sciences; Humanities; Law; Natural and Agricultural Sciences; Theology; Veterinary Science (the only one in the country); and the Gordon Institute of Business Science (GIBS), which has incorporated the first and oldest business school in the country. The faculties comprise a total of 140 departments and 85 centres, institutes and bureaus. UP is at the forefront of tertiary education in the country and collaborates with world-class partners to ensure continued excellence in learning and teaching.

The University celebrated its centenary in 2008 and from humble beginnings of four professors, three lecturers and 32 enrolled students it has now grown to approximately 40 800 undergraduate

students, 12 700 postgraduates and 4 000 full time staff members. It has transformed from a mainly white, Afrikaner institution to a multicultural, multiracial university that offers quality education to all South Africans. It is currently led by a Principal and Vice Chancellor who is its first black female appointee in this position, Prof Cheryl de la Rey.

UNIVERSITY OF PRETORIA LIBRARY SERVICES (UP LS)

The Department of Library Services (www.library.up.ac.za) is regarded as one of the best university libraries in South Africa. It provides a comprehensive information service and is host to a world class modern academic research library network spread over the six UP campuses and 10 locations. This service is aligned to the UP faculties with customised services for undergraduates, post-graduates, staff, alumni and visiting scholars. All services are designed towards creating a gateway to global information, and supporting learning, teaching and research through interaction with professional staff.

Key initiatives include access to wide-ranging print and electronic collections; online assignment support for undergraduate students; an online reference service (Ask-a-Librarian); wireless hotspots; federated search engines to access electronic journals, books and databases; electronic theses and dissertations (UPeTD); an institutional repository (UPSpace); various audio-visual materials; facilities for the physically challenged; and inter-lending facilities to national and international collections.

Additional physical facilities include the expanded Learning Centre, the state-of-the-art Research Commons for post-graduates, academics and researchers; and a modern training facility with seminar rooms and a mini-auditorium located in the Merensky Library. All of these actively contribute to a world class learning environment.

CONTEXT

NATIONAL SKILLS DEVELOPMENT

The Skills Development Act No 97 of 1998 aims to improve the working skills of South Africans so that the economy can grow and all South Africans can live a better life. The short supply of skilled staff is a serious obstacle to the competitiveness of industry in South Africa. The levy grant scheme, imposed by the Skills Development Act, 1998, and the Skills Development Levy Act, 1999, aims to expand the knowledge and competencies of the labour force. Improvements in employability and productivity will be achieved through new approaches to planning for training, learning programmes, incentives and an improved employment service. The Act does the following:

- provides a framework for the development of skills of people at work
- builds these development plans/strategies into the National Qualifications Framework
- provides for learnerships that lead to recognised occupational qualifications
- provides for the financing of skills development by means of a levy-grant scheme and a National Skills Fund

The Skills Development Levy, which was launched in 2000, is a monthly levy equivalent to 1% of a salary. It is mandatory for all companies that pay the pay-as-you-earn (PAYE) tax or have an annual wage bill of \$358 000 or more to contribute 1% of their payroll towards the Skills Development Fund. The institution is allowed to claim back this money upon submission of a Workplace Skills Plan and implementation thereof.

UNIVERSITY OF PRETORIA' HUMAN RESOURCES DEVELOPMENT (HRD) POLICY

The Skills Development Act and the Skills Development Levy Act informs the University's HRD Policy which was formulated in 2007. This document includes the purpose, principles, policy, HRD structure, funding and commitment for staff development. All faculties and support services are expected to adhere to this policy and design their own staff development plans that are in alignment with this policy. The policy enjoys the support and commitment of the Principal towards:

- Promoting a culture of learning that nurtures and encourages continuous learning in the workplace
- Ensuring human resources development in compliance with government regulatory requirements for a National Qualifications Framework, and a strategy for skills development and employment equity

The objectives of the policy are to

- Foster the vision, mission, values and commitments of the University
- Ensure the integration and uniformity of all human resources development (HRD) practices and processes
- Enhance staff members' employability
- Redress the imbalances resulting from the past
- Be accessible and available to all members of staff
- Ensure a high level of legitimacy among all stakeholders

The principles underlying the application of the HRD Policy

- The responsibility for the development of human resources is vested in the University Management, who delegates it to the line manager as the joint responsibility of this manager, the individual staff member and the support structures for human resources development.
- Human resources development opportunities should be geared towards the strategic goal of retaining, developing and utilising skills at the University.
- Human resources development should be accessible on an equitable basis, should promote the principles of equity, and should reinforce the aims and objectives of the University.
- The needs and priorities of the University regarding human resources development will evolve through a process of consultation and dialogue.

In alignment with the above and at an operational level, the Library has a Human Resources Development Committee (HRDC), which:

- Manages the annual reserve fund allocation
- Approves or disapproves the funding staff skills and/or development programme applications under \$2000
- Refer development or formal education programmes that exceed \$2000, with recommendations to the Learning and Development Unit
- Determines collective skills needs to utilise the reserved funds for this purpose or to request the Talent Development Unit consider developing a priority programme to meet these needs
- Refers applications to the L&D Unit when reserved HRDC funds are depleted

UPLS STAFF DEVELOPMENT FOR INSTITUTIONAL SUCCESS – WHY?

Given the above context and enabling University HRD environment, the UP LS should be satisfied with conducting staff skills development as per requirement and meeting training targets like many other institutions. But this is not the case! The UP LS management team strongly believe that the right people in the right positions with the right skills will serve the institution optimally. This enables them to:

- Support the University achieve its goal towards being an internationally recognised research institution by being a Library that is internationally comparable
- Be a strategic institution that fulfils its mandate
- Be a participative leadership institution that embraces the “one institution, many leaders” concept resulting in leadership depth
- Ensure that staff are aware that they are the backbone of the institution through an acknowledgement of their skills, expertise and contributions towards defining the institution we are and want to be
- Achieve success by creating an enabling environment wherein people are permitted to explore, experiment and “have fun”

Like many others the UP LS has undergone various redefinitions, re-institution, re-engineering and restructuring. Through all of this it has emerged as a strong institution that:

- Has a mandate – “The Library is responsible for the management of academic information and knowledge, and for leading the University in information and knowledge innovation”
- Earned a reputation for strategic bravery, innovation and independent thinking
- Is regarded as a leader in the arena of e-strategy
- Is classified under research

UPLS STAFF DEVELOPMENT FOR INSTITUTIONAL SUCCESS – WHAT INFORMS THIS THINKING?

The UP LS evolved as an institution over a period of time and believes that the strength of its institution resorts in its staff. It has been fortunate to have a staff complement of 253 that represents varying expertise, experience, specialisation and qualities. The following processes, trends and documents have contributed to its current thinking towards staff development:

Strategic Plan, 2006-2010

The first decade of the new millennium saw strategic plans emerging as documents that redefined libraries, their roles and relevance. Strategic plans became working documents and not just management exercises! The 2006-2010 strategic plan of the UPLS, written in 2005, highlighted the following:

- Alignment with the University’s strategic plan
- Launch of the e-Strategy which required new skills and thinking around e-services, e-resources, Web2.0 tools, the e-learning environment, e-research, collection management, IT, etc
- Alignment of the individual implementation plans of the various faculty libraries and support units to the Strategic Plan

Self-Review Process, 2006

In 2006 the UP LS undertook an intensive in-depth self-review in preparation for an institutional wide audit held in 2007 by the Higher Education Qualifications Council (HEQC). This self-review process highlighted the importance of "people for a professional service" and further referred to a general approach to staff training and development according to University policies and that the pace of staff development was too slow. This set the tone for a revised and more organised attitude towards staff development from 2008. However it still lacked a certain focus!

The Investors in People Benchmark Assessment

To ensure that it moves in the right direction regarding staff development, it was decided in 2009 to undertake a benchmark process with Investors in People South Africa (www.investorsinpeople.co.za). Investors in People is an international "people oriented" standard developed in the UK in the 1980s and implemented in South Africa since 2000. It is commended as a quality standard and people improvement tool, and is most often used as a benchmark for human capital development and practices in an organization. The Standard has 39 evidence requirements which have to be fulfilled. The Investors in People Standard is awarded only if these requirements are met.

The process entailed interviewing 35 members of permanent full-time staff representing gender, race and all post levels over a period of three days (27-29 October 2009). Members were selected from the entire UPLS staff list for interviews by the assessor. This process served to elicit staff perceptions, experiences and understanding of staff development within the UPLS.

The first report was circulated to all staff and a series of feedback meetings were held in November and the ensuing conversations were positive, constructive and useful for the future handling of sensitive issues. Although the UP LS was not awarded the Standard, the recommendations for improvement were incorporated in subsequent planning. Core to this was the identification of skills for all strategies; learning expectations; evaluation of the impact of development; and the measurement of the impact of learning. An important additional aspect of this process was the identification of core competencies for managers based on staff recommendations, namely:

- Leadership
- People skills (interpersonal)
- Understanding of management
- Communication
- Professional values
- Ability to identify staff development and training needs
- Understanding of and the effective use of the Performance Management System

The outcome and recommendations of this process informed the Staff Development Plan that was outlined in 2010 and will be finalised in conjunction with the new 2011-2015 Strategic Plan. Critical to this will be:

- The alignment of development needs with strategies
- Workplace skills vs Continuing Education and Professional Development (CEPD)
- Policies and criteria
- Funding sources

The transparency of the process, subsequent consultations and conversations and a genuineness to address issues resulted in a motivation, morale and attitude turnaround.

Self-Evaluation, 2010

In preparation for a Peer Review held in February 2011, the UP LS engaged in a 5-year self-evaluation process. This evaluation highlighted the positive change from the 2006 review and showed how attendance at workshops, seminars and conferences had increased and become strategically focused, and more staff members had taken up the opportunities to participate in them.

Strategic Plan, 2011-2015

This new plan has resulted in a dynamic vision and mission which will guide the institution for the next five years.

Vision	The University of Pretoria Library Services distinguishes itself as a global leader through redefining academic leadership.
Mission	To achieve the vision, the UP Library Services will adopt the "High Tech, High Touch" scenario by focusing on Leadership, Innovation & Technology, Partnerships & Client Services, and Staff Development.

STRATEGIES	OBJECTIVES
Leadership	<ul style="list-style-type: none"> • Create/strengthen a climate & culture for innovation; • Establish leadership for innovation; • Adopt a project planning approach to optimise our resources & future planning; • Transition to a conducive physical environment for innovation.
Innovation & Technology	<ul style="list-style-type: none"> • Delivery of new technology-based services; • Infusion of relevant technologies into client processes.
Staff Development	<ul style="list-style-type: none"> • Continuing Professional Development & Workplace Learning (CPDWL) based on identified skills sets aligned to the strategies.
Partnerships and Client Services	<ul style="list-style-type: none"> • High-level integration with research focus areas; • Embedded Librarianship; • Partnering with UP teaching & learning model; • Client Training.

It is obvious that in transcending the traditional boundaries of librarianship, staff skills sets will have to be re-assessed and developed to realise the above. Core skills and competencies are already being identified for the effective implementation of the new Strategic Plan.

UPLS STAFF DEVELOPMENT FOR INSTITUTIONAL SUCCESS – HOW IS IT REALISED?

The Performance Management System used by the University is an effective tool to identify development areas on an individual basis. Each staff member's development needs are managed individually. However there are professional skills that are identified as a group development need

and are treated accordingly, e.g. Research Methodology and Internet Research skills for librarians; Customer delight and communication for Circulation staff.

Staff development occurs variously and staff is given the choice to participate in development opportunities. Line managers and the individual staff member are involved in the selection of the programme based on the appropriateness and relevance to the person's development need. We have become more stringent and focused regarding conference attendance – conferences are identified that will add value to the organisation and individual attendee. Aside from formal programmes staff is also encouraged to use social media and new ways of sharing and exchanging ideas, information and knowledge.

Figure 1: Development categories and examples of training opportunities

Development category	Service Provider/ Host	Programmes	Funding
Formal training	UP, UNISA	Academic qualifications	SDF
Scarce skills OR specialisation	External	Java programming, Virtualisation; Digitisation; Research Methodology; Internet Research	SDF
Priority courses	CE@UP	Business writing, English as a second language, Personal financial planning, Communication in the workplace	UP
Professional development	Research Libraries Consortium (RLC)	2-week residential Research Academies	Carnegie Corporation of New York
	Centre for African Library Leadership (CALL)	2-week residential Library Leadership Academies; Train-the-Trainer	Carnegie Corporation of New York
	HERS-SA	HERS-SA Academy	UP discretionary fund
Workshops	Library and Information Association of South Africa (LIASA)	Leadership and Management; Collection Development; Inter-lending	UP LS
	Internal	60 minute workshops – blogs, wikis, RSS feeds, Flickr, YouTube, etc	No cost
Seminars/ Symposia	UP LS	The Electronic Learning Environment	Sponsorship (Swets)
	University of Stellenbosch Library	Annual Stellenbosch Research Symposium	UP LS
Conferences - National	LIASA; Gartner; IUG; SAOUG	Annual Conference	UP LS
	Partnership between UP LS, CSIR & University of Botswana	Annual Digital Scholarship and Curation Conference	UP LS
Conference - International		Computers in Libraries; The Internet Librarian; IFLA; ACRL; Northumbria; NDLTD	UP LS
Professional Visits	US State Department	Voluntary Visitors Program	US State Department

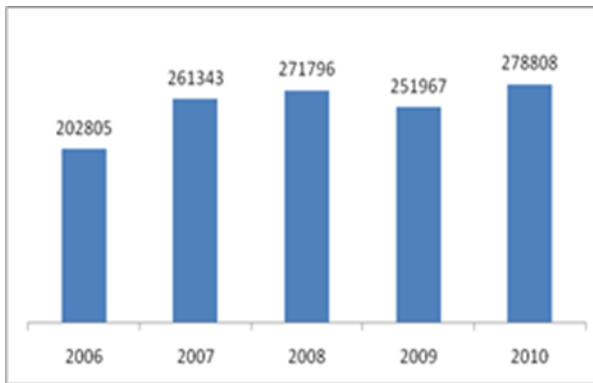


Figure 2: Conference and workshop funding, 2006-2010

Funding sources for these programmes is determined by the type of development opportunity undertaken. These sources include the Skills Development Fund (SDF) for scarce skills and academic programmes; UP for Priority Courses; internal UP LS funds for conferences, workshops and seminars; donor funds for grant related professional development programmes; and UP discretionary funds for national women' development projects. Figure 2 is an indicator of expenditure on conferences, workshops and

seminars for the period 2006-2010. For this current year we have already exceeded the annual allocation and are closer to R300 000 already.

Professional engagement & leadership roles

In recent years staff has been engaging and participating more actively in national and international LIS entities. Currently UP LS staff is involved in:

- The Library and Information Association of South Africa (LIASA) – President-Elect; National Secretary; national Interest Group Convenor & Deputy Convenor; local branch executive members
- Board of the National Library of South Africa – appointed by the Minister of Arts and Culture
- Legal Deposit Committee of SA – appointed by the Minister of Arts and Culture
- South African National Licensing Committee – Deputy Chairperson
- OCLC-EMEA – member
- Networked Digital Library of Theses and Dissertations – member
- World Digital Library – member of Technical Committee; Co-chair of the Translation Committee

In addition to these leadership roles staff engage with the profession on the basis of expertise and knowledge sharing. Several training programmes have been hosted on digitisation, 60 minute Web 2.0 workshops, mobile technology workshops, etc. This demand has necessitated the design of a business model that enables staff to benefit financially according to an 80/20 split between the staff member/unit and the UP LS respectively. The UP LS' 20% is held in a staff development fund which will be used for development opportunities of those staff members who are not involved in such initiatives.

IMPACT

The impact of these five years has been huge. The emerging expertise, professionalism and commitment of staff has resulted in a positive reputation and wide ranging confidence in the capabilities of the Library. The University Executive, donors and the LIS sector acknowledge the UP LS as an institution whose investment in its staff has paid off. Conversely staff have taken ownership of their learning and development, and know that the Management team are seen and can be trusted to fostering an environment that supports their personal and professional growth.

CONCLUSION

The UP LS is doing what several other institutions are doing. The difference, however, has been in acknowledging the importance of its staff as people first. Staff development is not treated as a means for meeting institutional targets but rather as an enabler for innovation and institutional success. By focusing on staff development, the Management team aims to leave as its legacy an environment of learning, inclusion and development and a corps of highly qualified and motivated professionals who leave a lasting impression on the University, the Library and the LIS sector.