

The applicability of a hybrid model to CILIP Scotland training and events

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Commissioned by CILIPS

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Executive Summary

This report was commissioned by CILIP Scotland to investigate the applicability of a hybrid model to training and events. A literature review was conducted in order to identify existing recommendations and provide context for the primary research. 140 CILIPS members filled out an online survey, and four were interviewed. This study found that online and hybrid events have increased general participation, but no format is presently fully accessible to all. Travel-related barriers are a limitation of in person events, and technology-related barriers are an equivalent limitation of online events.

Among our members, there is a strong appetite to return to conferences in person, but smaller events and training sessions should have a very clear rationale for running in person if no online option is offered. The main advantage of online access is the ability to engage with content at a customisable pace; this has benefits for those who attended in person, as well as those who could not. Seeking the speakers' permission to record conference content for later viewing is therefore recommended. This report concludes with recommendations drawn from the academic literature and CILIPS member feedback.

Table of Contents

1.0 Introduction	1
1.1 Background	1
1.2 Objectives	1
2.0 Methodology	2
3.0 Literature Review	3
4.0 Findings	7
4.1 Members’ training needs	7
4.2 Online and in-person event formats	8
4.3 Networking preferences	9
4.4 Motivations for attending events	10
4.5 Barriers to attending events	11
4.6 The effectiveness of small training groups	12
4.7 Memorable conference experiences	13
4.8 CILIPS events	14
5.0 Conclusion	15
6.0 Key Recommendations	16
References	17
Appendix: Quantitative Data	18

1.0 Introduction

1.1 Background

Due to the global COVID-19 pandemic, the CILIPS Annual Conference has been held online for the past two years. In June 2022, the conference returns to its traditional format at the Dundee Apex Hotel. CILIPS currently provides year-round access to online events, which are well received by members and non-members alike. Going forward, we wish to continue providing high quality in-person conferences without compromising the accessibility achieved by virtual provision. Previous studies provide examples of best practice for hybrid events of all sizes, but no research pertaining specifically to Scotland or to library and information professionals could be identified. Data has previously been collected about potential training topics, but further detail is required in order to ensure that we can meet our members' needs and expectations. By capturing rich qualitative data and drawing out recurring themes, this study aims to inform our future event provision.

1.2 Objectives

- To ascertain CILIPS members' current training needs
- To explore the relationship between events and networking
- To harness the advantages of the three event formats
- To mitigate the limitations of those formats and improve accessibility

2.0 Methodology

The main focus of the literature search was on hybrid conferences, with no particular industry in mind, because case studies involving large-scale events typically highlight common opportunities and challenges which may be less visible to the organisers of smaller events. The primary research stage made use of a digital survey and video interviews. To increase the pool of data and accommodate indirect criticism, participants were encouraged to reflect upon non-CILIP/S event experiences as well as events affiliated with CILIP or CILIPS. Statistics from the survey can be found in the Appendix.

The online questionnaire was completed by 140 CILIPS members. The most strongly represented sectors in the survey data were school, higher education, public and health libraries; these four sectors were also represented at the interview stage. A far greater number of respondents were aged 41 and above than 40 or below, and most were non-disabled. A majority identified themselves as white cis heterosexual women. As such, most of the sample did not belong to any of the three CILIP Diversity Networks. While the questionnaire was live, four semi-structured interviews were conducted in order to gain deeper insight into the perspectives of CILIPS members. The interview sample was necessarily influenced by the availability of participants, but sector, career stage, gender, and confidence with contemporary communications technology were evenly represented.

3.0 Literature Review

Lu, Farzan and Lopez (2017) explored the factors which influence community newcomers on the Meetup social network to attend offline events. The location of the event, the amount of prior information provided, the steps taken to make the event feel inclusive, and the influence of the event host(s) and other members were all identified as key contributing factors to reducing uncertainty about attending in-person events. The findings of this study could help support the inclusion of members who belong to underrepresented demographics, as well as integrating/reintegrating online regulars at in-person events in a post-COVID future.

Hamm, Frewe and Lade (2018) examined the impact of multimodal conferences within the existing traditional face to face paradigm, including the application of digital technology to in-person events. The conference sector had faced pressure to adapt for some time, but there was a reluctance to build outward from the traditional, proven model. The researchers identified three core issues: the suitability and deliverability of technological aspects of the conference alongside face-to-face aspects, how best to meet the needs of conference delegates, and balancing the interests of key stakeholders with the opportunity to invest in digital technologies.

Castro (2019) investigated the role of social presence (i.e., the projection of personal characteristics which enable other participants to view the speaker as a real person) in online professional conferences. It had previously been thought that a longer timeframe was needed in order for social presence to have an effect, but this

study found that participants delivering online presentations between 20-45 minutes long were able to project observable instances of social presence. Online conferences have been criticised as artificial and lacking in interpersonal connection, so this is an important finding. When delivering presentations online, the projection of social presence may require new techniques (or a redistribution of emphasis among existing techniques), so the following recommendations were provided: increasing interactivity, providing more information about the speaker, and modelling social presence cues (e.g., humour, tone).

Roos et al. (2020) considered the practicalities of running online events, drawing best practice from the Virtual Winter School on Computational Chemistry (VWSCC) which has run annually since 2015. They found that online gatherings had both benefits and drawbacks, and suggested that a hybrid conference format would, in future, offer the opportunity to reduce both the environmental impact and accessibility barriers associated with in-person events, without the need to compromise on networking and community-building. This paper proposes that hybrid conference organisers should allow “participants from a well-defined local geographical area” to attend in person, while “participants outside that region can follow the conference online” (p.3). By changing the location from year to year, and/or organising single-day seminars at a geographically diverse selection of universities, the travel impact of the conference is lowered, while retaining the facility for regional networking.

Raby and Madden (2020) explored inclusive participation at an academic conference organised by the Association for the Study of Animal Behaviour (ASAB). By comparing data from the virtual

conference and previous in-person conferences, the researchers found that carbon footprint was an increasing concern for those deciding whether to attend an in-person conference. Other barriers to in-person attendance included travel, accessibility, safety and financial cost. The perception of virtual gatherings as less effective for networking and other social opportunities was found to be a key barrier to participation in online events, but the increased flexibility of access to content was an improvement. Conference attendees felt that due to the lower running costs, online attendance should continue to be free of charge. This benefits economically disadvantaged attendees, challenges elitism, and encourages researchers from outside the field to participate. At the activity sessions, attendees were grouped according to their research interests; this proved more satisfying than the random allocation attempted at similar conferences.

Hoffman et al. (2021) conducted a case study on the strategies used by the organisers of the long-established Teaching, Colleges and Community (TCC) Worldwide Online Conference, which celebrated its 25th year in 2021. Alongside giving credit where it's due, this paper demonstrates that methods which many organisers see as risky innovations have been tried and tested. The organisers of TCC Worldwide identified four strategies as helpful for making conference-goers feel oriented, welcomed, connected and engaged: offering a pre-conference orientation, including regional keynote speakers, creating opportunities for informal exchange, and encouraging participation through the provision of digital credentials.

Niner and Wassermann (2021) based their case study around the 6th International Marine Conservation Congress (IMCC6), which moved

online in response to the COVID-19 pandemic. They found that this increased accessibility for those who would be unable to attend in person. An online or hybrid model for international conferences enables attendees to reduce their carbon footprint, while addressing systemic injustices in the field. The event organisers were able to recreate some benefits of in-person events, and many attendees were interested in attending future online events. Further actions identified for large international hybrid conferences are: integrating the online and in-person aspects of the experience as inclusively as possible, and improving access to technology for online attendees. Compared to purchasing carbon offsets or offering travel grants, running a hybrid conference is relatively accessible to small organisations.

Falk and Hagsten (2021) studied factors influencing ticket prices for tourism-related conferences. Fees charged depend on the size of the event, its location, and the academic field to which it belongs. The researchers observed that around a quarter of online conferences were free to attend, and there was a trend upward in price as time passed since the start of the COVID-19 pandemic. Some event organisers had hoped that the perceived value of the virtual format would increase with exposure. However, online conferences have significantly lower running costs, lack certain perks, and attract additional participants who are less able to afford to travel, so the dual pricing structure for hybrid conferences continues to be popular.

4.0 Findings

4.1 Members' training needs

Two areas of training were relevant to more than half of the 129 respondents who answered the question: Technology & Digital Skills was selected by 78 respondents (60.46%), and Management & Team Leadership was selected by 66 respondents (51.16%). Alongside these topics, 54 respondents (41.86%) were interested in Wellbeing & Advocacy training. The free-text question immediately following this generated 73 responses, many of which providing detail on why those headings were relevant to the respondents' needs.

Two interviewees stated that external training would be their only opportunity to develop key skills. As one mid-career librarian pointed out, public sector employees are often promoted internally with very little practical preparation. Many library managers need further training on topics like negotiation and budgeting, and their high level of responsibility motivates them to seek out dedicated courses. Solo workers face similar challenges, especially early in their careers, and would benefit from mentoring programs. "I don't have anyone above me to learn from," explained one recently chartered librarian.

4.2 Online and in-person event formats

When participants were asked about online and in-person training, 49.59% said that they prefer virtual training. This is a particularly strong response, because only 15.45% of participants selected "in-person", 17.89% had "no preference", while 17.07% considered it a case-by-case decision and wrote in reasons which would affect their choice. 99 respondents had received in-person training from at least one provider during their working life, and 104 had received virtual training.

When asked about events organised by CILIP or CILIPS, 81 respondents had attended an in-person event over the past five years, while 102 had attended a virtual event. About virtual training formats, no clear overall preference was expressed, but when asked about in-person training formats, 60.98% of respondents preferred for the content to be delivered over a single day. One interviewee said that chunking online training content into 30-minute videos aids focus and makes it easier to fit around work and leisure. The interview and survey data indicate that distance and its associated factors (travel time and travel cost), are the most common reasons for members preferring the single-day intensive format when attending in person.

The data suggests that the provision of online events and training has widened participation among CILIPS members, and that the concept of online and hybrid event provision has exceptionally high relevance to those members who participated in the survey.

4.3 Networking preferences

A slight preference can be observed for in-person networking activities, with 41.05% preferring in-person, 34.74% expressing no preference, and 24.21% preferring to network online. 84.21% of respondents were interested in networking with members working in the same sector, and a notable 18.95% were interested in networking with non-members (e.g., people working in other industries). 63 respondents said that networking with members in their own region was important to them, and 52 would like to network with members anywhere in the UK. There may be scope to decouple online and in-person networking activities from events and training, because the relationship between in-person events and networking is convenience-based, and networking at online events is challenging to organise.

4.4 Motivations for attending events

Three of the interviewees were strongly motivated by interest in the subject matter of the training, and/or its relevance to their job role. One interviewee stated that the decision about which training to attend is “very influenced” by the employer’s preferences. Value for money often tips the balance between online and in-person events, and free-to-attend online events are looked upon favourably. One interviewee stated that the in-person experience is worth a higher price, so for hybrid events, the online experience should be the cheaper option. It was also felt that online events work better when they are available for asynchronous viewing, because this allows “flexibility to pause, rewind, reflect”.

The isolated nature of the interviewees’ working roles was a recurring theme. All of the interviewees described themselves as having responsibilities which differ from those of their direct colleagues. Training and events provide contact with other people who work in similar roles, and networking opportunities are a strong motivator for attending events. For those who are the sole librarian in their organisation, online training has the advantage of not requiring them to close the library in order to attend. On the other hand, a common motivating factor for attending in-person training is the ability to set aside time specifically for that; some employers expect online training to be undertaken alongside workplace tasks, or in the employee’s free time, and this makes the information more difficult to absorb.

4.5 Barriers to attending events

79 survey respondents had experienced barriers to attending in person events, and 72 had experienced barriers to attending virtual events. The three most frequently mentioned barriers for in-person events were “time” (38 mentions), “cost” (31), and “travel” (29), whereas the most frequently mentioned barriers for online events were “work” (16 mentions), “time” (15), and “Zoom” (14). Among the “Zoom” complaints, the following subthemes were identified: “Zoom fatigue” (a form of burnout specific to videoconferencing), technical difficulties (anything from unsuitable equipment to lack of training in the use of the program), and the policies of specific workplaces (many organisations block the Zoom program on security grounds).

The themes of distance, time and lack of funding also emerged in the interviews. “Travel expenses are a problem, and the time taken to travel can be a half-day’s difference.” Training budgets have shrunk; two mid-career professionals readily recalled having had more freedom to pursue training and attend conferences in the past. Employers “often ask that you prove the value of the course”, and they expect the attendee to report back to their colleagues about it. Event organisers should make the most of the format they are using; in-person events should be worth travelling to, and recordings should have adequate audio (e.g., microphone quality, loudness normalisation). To make matters worse, some employers are skilled at turning an option into an obligation: “If my employer found out I could attend online, they would say no to in-person,” said one interviewee.

4.6 The effectiveness of small training groups

One interviewee said that in-person training is most effective when it incorporates practical aspects, but hybrid meetings have worked well with smaller groups, particularly when it is possible for both the online and in-person attendees to see each other's faces (e.g., by having the in-person attendees sit in a circle, facing the screen).

Another interviewee, also referring to an in-person training session, focused on the specificity of the skills being taught, the advanced subject knowledge of the trainers, and the attendees coming to the session with similar background knowledge. The group was able to work at "quite a nuanced level", which is most achievable when the attendees are either all working in equivalent job roles or receiving their training together as colleagues.

These pieces of feedback suggest that some members prefer to learn targeted skills alongside a small group of people working in the same sector who are at a similar stage of skills acquisition. The efficiency, specificity, locality and one-to-one support available on the day can be framed as plus points for training sessions which offer a limited number of places, whether they are hybrid or fully in-person.

4.7 Memorable conference experiences

The School Library Conference was highlighted as an example of best practice. For the 25th anniversary of Nosy Crow (publisher), attendees at the online SLC were sent a box of “goodies” (e.g., books, party hat, branded empire biscuit). At a specified point in the digital conference, those who had received their boxes put on their hats and ate the biscuits together. This activity was intended to provide a shared physical experience, and could only have been improved by all of the parcels arriving on time.

Another memorable experience was of an individual speaker at a conference. The speaker illustrated how rapidly her role as a media librarian, once a priority in the 90s and 00s, had disappeared; this served as a reminder of the pace of change which can occur within a librarian’s career. Too often, the desire to maintain an upbeat atmosphere throughout an event can leave attendees feeling that their anxieties have been dismissed, so the interviewee strongly appreciated this speaker for validating the audience’s concerns.

4.8 CILIPS events

Perceptions of CILIPS events were positive. The quality of the exchanges CILIPS facilitated between live speakers and online viewers stood out as a highlight, as did the networking offered in person. One sector-specific event, which took place online, was noted for the impressive logistics of its targeted use of breakout rooms. Attendees were matched with others who live and work in the same area of Scotland. This approach made it easy to share information about local and regional collaborative opportunities, and it had the added advantage of bringing together people who could realistically meet up in person if they wanted to.

Another interviewee was especially satisfied with a full-day interactive event which took place in person. The activities at this session were chunked (e.g., 10–15-minute presentation, then Q&A, then practical activities), and the training was sector-specific. Attendees were encouraged to bring in laptops so that they could apply their learning directly to their own resources, and they were given the option to work either alone or in groups.

The CILIPS conferences, in particular, were praised, and there was significant enthusiasm about attending major events in person. “It feels worth the cost, and the effort put in to travel there,” said one interviewee. “The range of speakers was very informative, and gave us ideas,” remarked another, who had attended two conferences online and one in person. “I’m hoping to go to this year’s CILIPS conference — looking forward to that.”

5.0 Conclusion

The purpose of this study was to aggregate recommendations from existing research, and to generate rich qualitative data; taken together, this information will help to shape future training and event provision. The feedback from CILIPS members indicates that continuing with a mixture of online and in person events would best fit the needs of library and information professionals in Scotland. Especially for smaller or lower-budget events, the most equitable and effective approach is to target delivery to the needs of attendees and the strengths of each format.

Increasing the hybridity of conferences is a cost-effective and relatively simple way to widen participation, but due to the need for flexibility, techniques other than live online access should be explored. Providing video playback and digital handouts would yield maximum benefit to ticketholders while serving as a perk for CILIPS members who were unable to attend. If such content were made available via a dedicated online portal after the conference, this would both protect the value of the speakers' labour and maintain the appeal of in-person attendance to those who are able.

6.0 Key Recommendations

- Provide a clear rationale for smaller events which are held in person, such as practical activities or networking
- With permission, group activity participants by relevant attributes such as sector or interests
- Prefer Microsoft Teams for events which take place during working hours, because many workplaces block Zoom
- For online lectures and talks which are not highly interactive, consider pre-recording the video and audio content
- Online training content is best chunked into short videos, because this is easier to fit around other commitments
- To limit travel time and cost, in-person training works best as a one-off, whole-day commitment
- To reduce emissions, consider varying the location of significant events, or encouraging online participation

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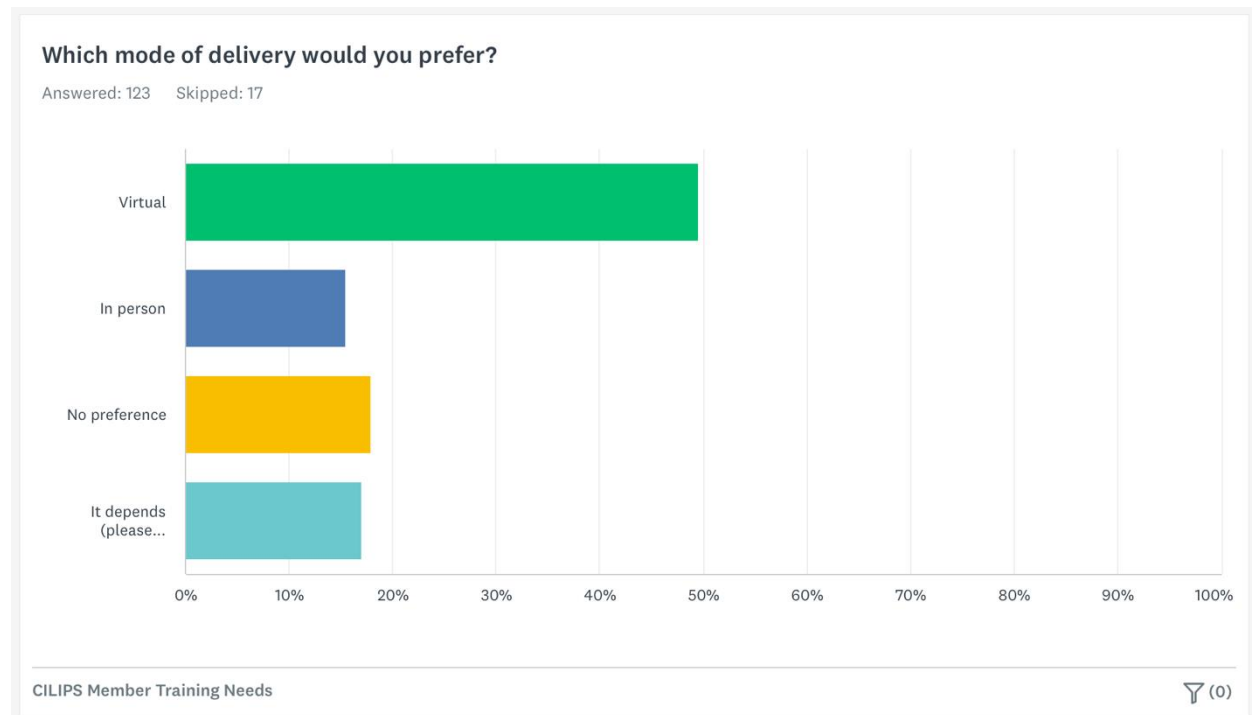
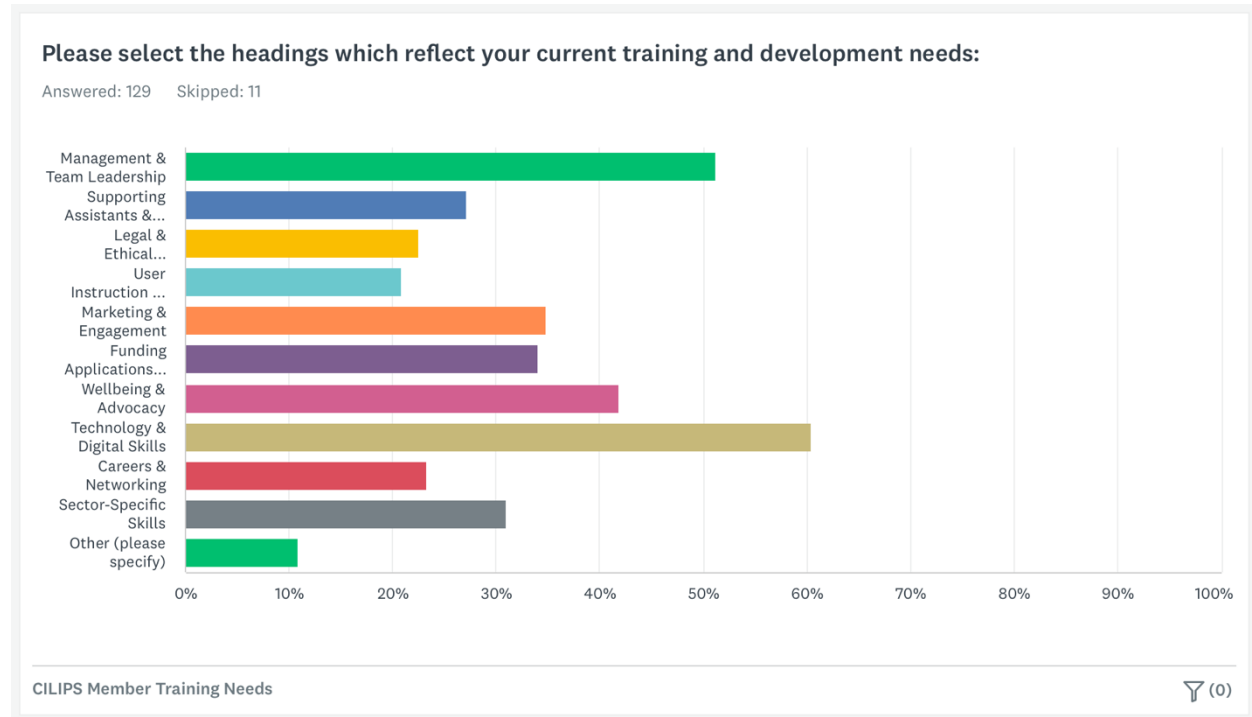
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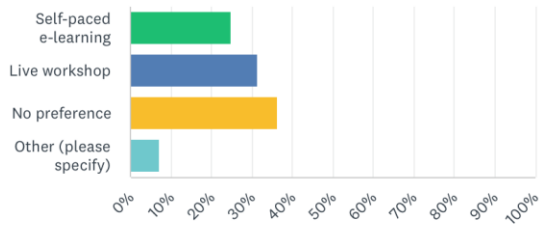
Appendix: Quantitative Data

Additional charts can be viewed on SurveyMonkey (private link):
https://www.surveymonkey.com/stories/SM-3JvQSuehRELE_2Bpk8jPmLrg_3D_3D/



Which virtual training format do you prefer?

Answered: 124 Skipped: 16

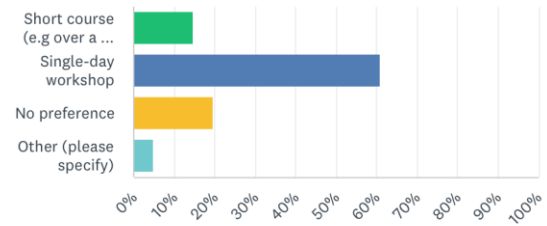


CILIPS Member Training Needs

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Which in-person training format do you prefer...

Answered: 123 Skipped: 17

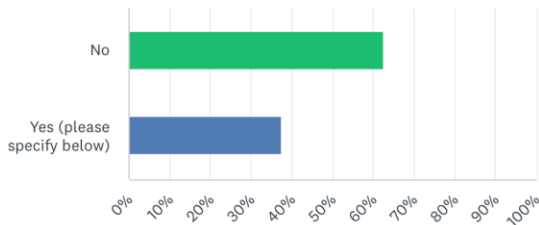


CILIPS Member Training Needs

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Have you ever experienced any barriers to at...

Answered: 115 Skipped: 25

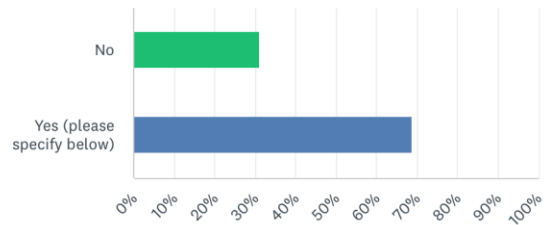


CILIPS Member Training Needs

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Have you ever experienced any barriers to at...

Answered: 115 Skipped: 25

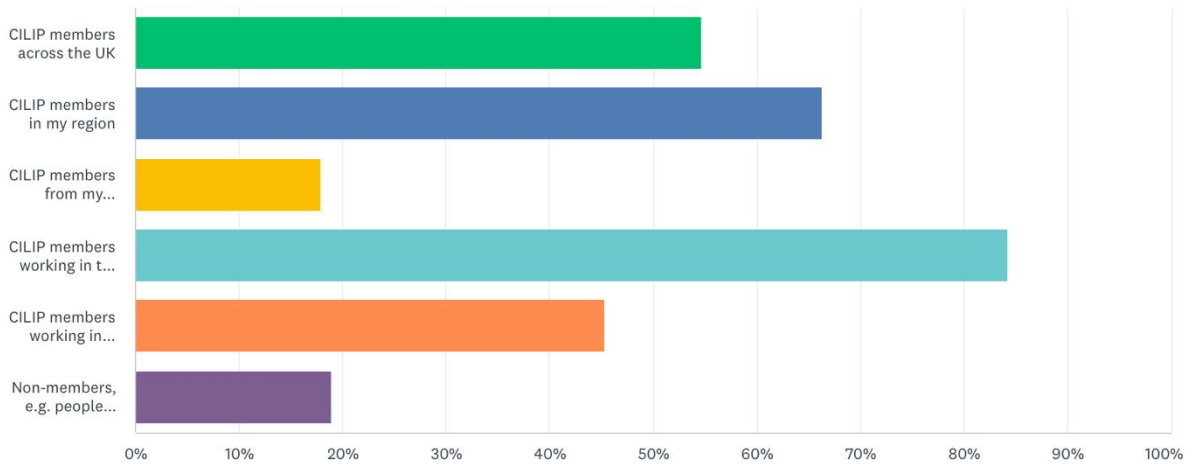


CILIPS Member Training Needs

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Which groups are you interested in networking with?

Answered: 95 Skipped: 45



CILIPS Member Training Needs

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