Portfolio Building
Acknowledgements

I am grateful to the following members of the Staff Development Group of the National Library for Health who have contributed their expertise and their time to this collection of resources for portfolio building:

- Shan Annis
- Pauline Blagden
- Alison Bramley
- Clare Edwards
- Joanne Stemp

Dorothy Curtis, Library Services Manager, at Gloucestershire Hospitals NHS Foundation Trust made a series of valuable comments, and supplied some of the resources.

The resources are intended to be used to stimulate discussion and debate, and are not intended to be a comprehensive collection for every situation. The resource list at the end of this pack suggests further areas of investigation.

David Copsey
June 2008
Contents

Portfolio Template Headings 4

Examples of reflection 5

KSF Portfolios 12

Frequently asked questions 25

Resource list 26

Appendix 1: Objective setting: CILIP Framework 27
<table>
<thead>
<tr>
<th>Portfolio Template</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Name</strong></td>
</tr>
<tr>
<td><strong>Job Title</strong></td>
</tr>
<tr>
<td><strong>Employing Organisation</strong></td>
</tr>
</tbody>
</table>
| **Curriculum Vitae**  
Include if required by awarding body |
| **Purpose of Portfolio**  
- KSF Outline  
- ACLIP  
- MCLIP  
- FCLIP  
- CILIP Revalidation  
- NVQ  
- Personal Development |
| **Personal Statement** |
| **Evidence of Learning: formal and informal** |
| **Reflective Log** |
Examples of Reflective Writing NB best viewed on screen

Training for GPs and Nurses at a Surgery, 8 February 2006
This was a new experience for me, since I was leading a training session for staff at a surgery including 4 GPs, 2 nurses and 1 member of administrative staff. I had prepared a session based on the GP training I had provided in Sandford last year but with some changes to content based upon my experience on that day. Preparing the content, making packs and finding the actual surgery put me under more pressure than I would experience for a normal group training session but I think that it was worth it. Although everyone had varying levels of experience in looking for information, I think everyone learned something new and found resources that would be useful to them in the future. For future GP training, I need ensure I have confirmed the equipment available beforehand and make sure I have planned travelling to the surgery properly. Now that the training materials have been produced future training should be more straightforward.

GP Training for Postgraduate Education, 8 March 2006
This session was an adaptation from a similar GP training session I had completed in November and those I have been doing in the surgeries. I felt that this session did not go as well as the previous one. This could be partly because the organiser at Postgrad had not been as clear about all the arrangements, such as refreshments etc. From a training perspective, I had been a bit unsure about the order in which to approach different resources and I think this is something I need to decide and follow in every session that I do. I also think I expect the GPs to have too many skills already and take for granted that they know what I mean by some of the library terminology (e.g. abstracts). I need to make sure I give a bit more background about looking for information. In terms of content, I think the focus on searching Medline is more appropriate for users undertaking research and studying. I need to focus more on quick reference tools for GPs. It would be helpful to spend some time reading about the information needs of GPs and find out about some of the specific resources that are available for them. I could also contact other trainers in other trusts to find out about the content that they teach. Despite my reservations, the feedback from the evaluation forms was still very positive and I think everybody learned something they could use.

Work on KSF, 23 October 2006
I was trying to find evidence for the two extra sections of my KSF, IK3 and G1 (Learning and Development). As I was trying to find evidence that I use evaluation forms when planning training sessions and incorporate feedback into sessions, it made me realise that I need to do this in a more formal way. I also need to use the knowledge I am gaining about different learning styles and use this to alter the way that I present sessions. I feel that it is time I stepped up a gear and instead of simply providing information for users to pick up if they are able to; I need to ensure that different users of different abilities, with different learning approaches all have an opportunity to learn vital information skills.
HELICON Accreditation Process - Reflection

The Trust Library was established as a new service in 2000, following the withdrawal of ***** University Library services the previous year. As a new, multi-disciplinary library service, it was important both to library staff and to Trust management to ensure that service provision was adequate and that we were “heading in the right direction” with the library strategy. For this reason, we volunteered to be a pilot site in this strategic health authority for the HELICON health libraries accreditation process. [descriptive]

HELICON proved to be a very valuable opportunity for us to review and critically appraise the service in detail. On reflection, we were carrying out a SWOT analysis on the service. We identified the strengths of our service (a well-established user education programme; a range of collaborative project work; strong reputation with current library users) and evidenced these. We then identified our weaker areas (service profile among senior management; lack of awareness of services among certain staff groups; low funding levels) and outlined how we intended to address these through the library strategy.

We were able to use the accreditation process as a lever for change for the library service. A number of small improvements which had not been previously actioned, became priorities in the run up to the visit e.g. making the online library catalogue available via the Intranet; internal and external signage. Following the accreditation report, additional funding was secured for library staffing and knowledge resources.

Quality-vetting of the service helped to address one of the major weaknesses of the library i.e. it helped to raise the profile of the service with senior management. The Chief Executive and other senior managers were interviewed about the role of the library service as part of the accreditation visit. This was extremely useful in bringing the library service to the front of their consciousness. As a result, the Library service is now included in the annual round of service reviews and visits carried out by the Board.

The library was awarded Stage 2 Accreditation with some areas of excellence and received an excellent HELICON report. This has helped to build both user confidence and library staff confidence in the service. [descriptive]

Following the visit and subsequent report, a structured action plan to ensure that the library retains accreditation status has been put in place and is regularly reviewed. This helps to maintain the direction of travel and continues to act as a lever for change.

The panel recommended that the librarian should be involved at a strategic level with a number of initiatives including Knowledge Management strategy;
Improving Working Lives and Freedom of Information. This recommendation has caused me personally a degree of difficulty. I see the benefit of extending the scope of the library service beyond traditional boundaries and have become involved at an operational level with a wide range of initiatives e.g. Learning Representatives; Agenda for Change; Internet/Intranet Group etc.

There are two separate issues to consider here. Firstly, the greater the range of activities and networks I become involved in, the less I am able to devote time to my core commitments in the library. The second issue relates to the difference between operational and strategic involvement. I believe it is very difficult to move from one level of involvement to another. In my view, the difficulty lies partly in the hierarchical structures within the NHS and partly in my own self-perception. I have considered these issues in some depth in a recent FOLIO online learning course and I have highlighted the need to improve my influencing skills and assertiveness through my PPDP.

Overall, the “accreditation experience” has been a positive one and helped to highlight a number of issues in the library which we had been previously unable to address.

amended from a Chartership submission
Introduction to databases session 29th and 30th November 2007

Personal reflection

Felt well prepared and quite relaxed about session as I have now prepared for the session on 5 different occasions with varying numbers of participants (1 – 6).
I am comfortable with nursing students/health care assistants in particular and feel capable of answering their questions relating to Athens registration and easy searching on Dialog databases.
We still seem to have a problem getting the message across that the session is held in the I.T. training room. People repeatedly arrive at the library for the session. I also think that the location of the training room (remote from main hospital) is one factor in people not attending sessions.
The session itself seems to work fine, as long as it is aimed at people with little or no experience of Athens registration or NHS databases. I do not believe the content itself is sufficiently demanding for those with experience of either of these subjects. I need to bear this in mind and ensure that would-be learners are aware of this when enquiring about booking a place.
Length of session seemed just right (1 hour). The content worked well. Although I do think that this is something on which to focus in future – perhaps basing a simple search around a topic suggested by students themselves on the day (something in which they are involved in directly through work placements). Need to take into account that a search that has not been prepared in advance could produce too many or too few results and consider how to manage this situation.
Locating the session near to the library would, I believe, be very useful in expanding the content and would enable learners to locate full-text of articles in a hands-on fashion, which should better promote their understanding of Library resources.

Follow up with Joanne;
i) No floppy drives in machines so session workbooks/script needs to be amended to cover this?
ii) Learners requested Certificates – Joanne sent master to use for session.
iii) Need to ensure session is advertised on the Trust HQ Info. board for learners arriving at education centre.
iv) Ensure that learners are given a description of the session content when they book a place.

Depending on the ease of use and my understanding of the new clinical databases to be introduced to Trust 2008, I would be happy to run a similar session for learners.

Sylvia Hughes, senior library assistant (slightly amended)
Reflective record

Critical appraisal workshop: The event I will reflect on was a facilitating critical appraisal training session’s course I attended provided by the BMA (Certificate in portfolio).

The course was an intensive one day course, and highlighted the skills needed to facilitate a critical appraisal workshop. It was very involved and everybody had to contribute to the learning process. At first I found this a bit daunting as I was wary of my knowledge on appraisal, however it was soon obvious that we were all in the same boat and could help each other with bits of knowledge that we had.

What went well was meeting with like minded people and forming contacts with similar interests and the future option to share ideas or course material. Also the course leaders were very engaging and helpful throughout the day.

However I do feel the workshop could have included a bit more about critical appraisal skills and tips rather than the main theme which was the facilitating aspect.

The learning process was enhanced by group sessions, discussions and an interesting session on ice-breakers which I must use in future workshops.

Unfortunately I haven't applied my new found knowledge yet, but do plan to use it in critical appraisal workshops, the course has given me more confidence to approach the subject as well as some good skills. More importantly it has made me realise that there are many other people out there who feel exactly the same about this particular subject, and by keeping in contact we can help each other with tips and feedback from our own sessions. As a personal target I have set a deadline of February 2008 to organise and facilitate a critical appraisal workshop with the new intake of junior mental health doctors.

The course was attended because it was identified in my personal development plan. I understand the importance of getting this project off the ground and have the backing of senior management to ensure I can improve my skills when the right courses and opportunities become available. I am very grateful for this opportunity.
Reflective Record

Piloting new Trust induction: A project I undertook this year was to redesign and deliver Shire Health Libraries Trust induction. To do this I had to liaise with current members of the library team and decide what should be included in a trust induction and how it should be delivered. We wanted to reduce the number of PowerPoint slides, but make sure we still managed to get the library message across in the time allocated. We have a 30 minute slot on the Trust induction so it is important we have a succinct message, but also time to answer any queries inductees may have.

I enjoyed this experience and the responsibility that came with it. I have redesigned the induction and am pleased with the final product. However I am now aware that the current induction is starting to look dated and a lot of our electronic resources have changed. So I will either update the induction or once again go for a complete overhaul. I now have the confidence to do this due to my experience with the first induction. Also by designing the induction it gives me more confidence on the delivery because I am so comfortable with the content.

I did encounter problems with the design because team members had their own ideas of content and essential elements of the slides. A lot of liaising was needed and hopefully I managed to incorporate aspects of everyone’s ideas in the final product. Also by running the new induction for a while now has given me the chance to evaluate the induction process and note which slides work well and which ones do not. Hopefully this should ensure more improvement for the next induction design.

The induction process has helped me develop in a professional capacity by giving me much more confidence. For the first few inductions I was very nervous about delivering the presentation to over 50 people, but the more I have done, the more confident I have become and now public speaking or delivering presentations doesn’t phase me at all. An example of the Trust induction slides is in the portfolio.
## REFLECTIVE RECORD

**Date:** 16<sup>th</sup> September & 15<sup>th</sup> October 2003  
**Development Activity:** Training Skills Course

<table>
<thead>
<tr>
<th>What I enjoyed:</th>
<th>The group work – having to prepare and deliver some training on a subject we knew little about in a short space of time.</th>
</tr>
</thead>
<tbody>
<tr>
<td>What I found difficult:</td>
<td>The course was not at all what I had anticipated as it was very experiential learning whereas I would have preferred some theory. The trainer had no library background and I was really sceptical after the first day as to whether this would meet my needs and be applicable to the information skills training I was going to be delivering.</td>
</tr>
</tbody>
</table>
| What I learned: | • About the different learning styles and that I am a very theoretical person which was why I was initially resistant to this training.  
Most importantly – that you don’t have to be an expert on a particular subject to be able to deliver effective training. |
| What this learning connects with: | The programme of training that I am going to be delivering for the library. |
| Ways in which I intend to follow up this activity are: | Try to incorporate elements of what I have learned in the training sessions:  
• That I should ensure that the training courses I run accommodate other types of learning styles such as interactive sections for Activists.  
• Use of different colour paper for handouts |
| Other things I need to record: |                                                                                                                                                 |
1. KSF Portfolio Development

A portfolio of development is important to support KSF as it is used to demonstrate:

- Skills you have gained
- Achievements at work
- Qualifications
- Feedback you have been given

In putting your portfolio together you need to be selective in gathering evidence which demonstrates how you are developing to meet any gaps in your knowledge and KSF profile. It important not to cram everything you can think of into a KSF portfolio but to identify pieces of evidence which demonstrate your skill development and learning and in particular how you have applied your learning in your work place. The types of evidence you may want to include in your portfolio include:

- Certificates
- Learning Logs
- Reflective Records
- Pieces/examples of work –to demonstrate development of a new skills

The following template provides details of types of learning and experiential development that you could carry out and what evidence for these you could include in a KSF portfolio
## 2. Evidence Types

<table>
<thead>
<tr>
<th>Type of Learning and Experiential Development</th>
<th>Evidence to include in KSF portfolio</th>
</tr>
</thead>
</table>
| **Short courses** – one or two days, including e-learning courses. | **Copy of certificate**  
**Learning Log record** – identify the learning outcomes form the day, any new skills acquired and how you have applied these to the work place |
| **Job shadowing** - a helpful way of building on understanding of a different sector or different role | **Report from visit** - evaluate what you have learned from the visit and how you might apply that learning in your own work place |
| **Working with a mentor** - if you have particular challenges which you need help with you might find having a one-to-one support of a mentor a considerable benefit |  
**Reflective Log** – report of experience and how you dealt with it, how you could have managed it differently, what you would do in the future  
**Learning log** – what your learning outcomes are from the sessions with your mentor, how you will apply the learning |
| **Background reading** – books, journals, websites | **Bibliography**  
**Learning log** – about what you have learned from the reading and anything you have put into action as a consequence. |
| **Attending a Conference** – a good opportunity for networking and hearing experts describe their approaches and experiences. | **Report on Conference** – what sessions you attended, what learning resulted, details of any new contacts and networks and the benefits of these  
**Presentations** – copy of presentation/poster were a presenter at the conference. |
| **Taking on a new responsibility** - this can be a very practical way of extending your skills - you may want to take on the responsibility for a staff member to help you develop supervisory and management skills | **Example of a new pieces of work** - include a copy of a product if possible for example for Core 1 if you need to develop your report writing skills then you may want to include a copy of a report.  
**Reflective Log** – provide details of your new responsibilities, reflect on how you are managing the new responsibilities, details of any skill developments, learning and achievements. |
| **Managing a Project** – project management skills are increasingly important and help to develop planning and management/people development skills. This can be quite a | **Examples of new pieces of work** – this could include project plan, action plan, reports, evidence of communicating with a range of people e.g. letters and emails. |
small project but should involve working with other people so you can gain experience of different communication styles, delegation and co-ordination of activity.  

<table>
<thead>
<tr>
<th>Activity</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Getting involved in email discussion lists</strong></td>
<td><strong>Copies of discussions</strong> – for core 1 to demonstrate communication skills</td>
</tr>
<tr>
<td></td>
<td><strong>Reflective Log</strong> – how you have used the discussion list, benefits for your own learning and the workplace.</td>
</tr>
<tr>
<td></td>
<td><strong>Learning Log</strong> - Details of any learning from the discussion and how you have applied this to the workplace</td>
</tr>
<tr>
<td><strong>Attending and contributing to Library and/or Trust committees and meetings</strong></td>
<td><strong>Reflective Log</strong> – Analysis of your contribution to the meeting – if for core 1 then include how you used communication techniques effectively, what you used why appropriate, who was your audience. Any learning experiences from attending the meeting.</td>
</tr>
<tr>
<td></td>
<td><strong>Examples of pieces of work</strong> – Copies of any papers, presentations you prepared for the meeting.</td>
</tr>
<tr>
<td></td>
<td><strong>Feedback</strong> – You could ask a colleague or manager to provide you with feedback on your performance at the meeting.</td>
</tr>
</tbody>
</table>

¹ Details of learning opportunities are taken from NLH Skills for Success: Health Library Staff Development Framework. Guidance – Identifying effective ways of achieving your learning and development needs.  
http://www.library.nhs.uk/nlhdocs/achieving_learning_needs.doc
3. Example of Portfolio Evidence

The following template provides an example of the type of evidence which could be included in a portfolio to meet Core Dimension 1 and Levels 1 to 4. Also detailed are different types of training opportunities for each level. The evidence identified for this dimension may also support other dimensions in your KSF portfolio. When you are putting your portfolio together try to think how pieces of evidence will cross-reference

<table>
<thead>
<tr>
<th>Core 1 Communication Level 1</th>
<th>Skills / Training Opportunities</th>
<th>Evidence</th>
</tr>
</thead>
<tbody>
<tr>
<td>Indicators</td>
<td></td>
<td></td>
</tr>
<tr>
<td>The worker:</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
| a) communicates with a limited range of people on day-to-day matters in a form that is appropriate to them and the situation | Customer Services | 1. Courses:  
|                              |                               | • Certificates – attendance at Customer Care Course |
|                              |                               | • Learning Log - a report about your learning outcomes from the customer care course and any changes you have made as a result of the course |
|                              |                               | 2. On the job activities/Work Products  
|                              |                               | • Reflective Log – example of dealing with an awkward/difficult customer – what you did, what you learned, what you would do differently |
|                              |                               | • Examples of work ( only 2-3) |
|                              |                               | • Written email |
|                              |                               | • Recording ILL stats |
|                              |                               |          |
| b) reduces barriers to effective communication. | Assertiveness |          |
|                              | Dealing with awkward customers |          |
|                              | Basic communication skills e.g. telephone, email etiquette |          |
|                              | Disability Discrimination Act awareness / complaints |          |
|                              | Data Protection |          |
|                              | Adventures in selling: promoting your library service and yourself. |          |
|                              |                               |          |
| c) presents a positive image of her/himself and the service. |                               |          |
|                              |                               |          |
| d) accurately reports and / or records work activities according to organisational procedures. |                               |          |
|                              |                               |          |
| e) communicates information only to those people who have the right and need to know it consistent with legislation, |                               |          |
|                              |                               |          |
### Core 1 Communication Level 2

<table>
<thead>
<tr>
<th>Indicators</th>
<th>Skills/ Training Opportunities</th>
<th>Evidence</th>
</tr>
</thead>
<tbody>
<tr>
<td>The worker:</td>
<td></td>
<td></td>
</tr>
<tr>
<td>a) communicates with a range of people on a range of matters in a form that is appropriate to them and the situation.</td>
<td>- Interview and Reference Questioning</td>
<td></td>
</tr>
<tr>
<td>b) improves the effectiveness of communication through the use of communication skills.</td>
<td>- Residents: opportunity to explore an aspect of CPD in more depth over 2 or 3 days. A chance to socialise and network with peers</td>
<td></td>
</tr>
<tr>
<td>c) constructively manages barriers to effective communication.</td>
<td>- Communication skills course: eg understanding communicating behaviour. Communication in the workplace</td>
<td></td>
</tr>
<tr>
<td>d) keeps accurate and complete records consistent with legislation, policies and procedures.</td>
<td>- Presentation skills: developing your impact and presence.</td>
<td></td>
</tr>
<tr>
<td>e) communicates in a manner that is consistent with relevant legislation, policies and procedures.</td>
<td>- Teaching Skills: To enhance the ability of participants to plan and provide effective</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>1. Courses:</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• <strong>Certificates</strong> – attendance at Interview and reference questioning techniques</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• <strong>Learning Log</strong> - a report about your learning outcomes from the course, any skill development and changes you have made as a result</td>
</tr>
<tr>
<td></td>
<td></td>
<td>2. New Responsibilities:</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• <strong>Reflective Log</strong> – leading a team/staff meeting. Reflect on any communication skills used, how you ensured these were effective. Any barriers in communication you had to overcome and how. Any learning and skill development from the experience.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• <strong>Work products</strong> – any written communication developed for the meeting</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• <strong>Feedback</strong> – feedback on</td>
</tr>
</tbody>
</table>
### Core 1 Communication Level 3

<table>
<thead>
<tr>
<th>Indicators</th>
<th>Skills/ Training Opportunities</th>
<th>Evidence</th>
</tr>
</thead>
<tbody>
<tr>
<td>The worker:</td>
<td></td>
<td>1. Courses:</td>
</tr>
<tr>
<td>a) Identifies the range of <strong>people</strong> likely to be involved in the</td>
<td>• Facilitating and chairing meetings</td>
<td><strong>Certificates</strong> – Facilitation workshop</td>
</tr>
<tr>
<td>communication, any potential <strong>communication differences</strong> and relevant</td>
<td>• Effective in Meetings</td>
<td>Equality and Diversity Training</td>
</tr>
<tr>
<td>contextual factors.</td>
<td>• Report writing</td>
<td><strong>Learning Log</strong> – for all training courses. Detail learning outcomes particularly in terms of communication differences and use of the communication techniques. Detail skill developments and any developments in your own abilities or changes in working practices and procedures.</td>
</tr>
<tr>
<td>b) Communicates with people in a form and manner that:</td>
<td>• PALS training – dealing with patients</td>
<td>2. Attending a Trust committee</td>
</tr>
<tr>
<td>− Is consistent with their level of understanding, culture, background</td>
<td>• Body language</td>
<td><strong>Work Product</strong> – papers produced for the meeting</td>
</tr>
<tr>
<td>and the preferred ways of communicating.</td>
<td>• (cultural awareness – names)</td>
<td></td>
</tr>
<tr>
<td>− Is appropriate to the purpose of the communication and the context</td>
<td>• Emotional Intelligence: understanding of emotions, in</td>
<td></td>
</tr>
<tr>
<td>in which it is taking place.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>− Encourages the effective participation</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

3. **On the job activities/Work Products**
Examples of dealing with a range of different people e.g. copies of emails
c) Recognises and reflects on barriers to effective communication and modifies communication in response.
d) Provides feedback to other workers on their communication at appropriate times.
e) Keeps accurate and complete records of activities and communications consistent with legislation, policies and procedures.
f) Communicates in a manner consistent with relevant legislation, policies and procedures.

<table>
<thead>
<tr>
<th>Core 1 Communication Level 4</th>
<th>Skills / Training Opportunities</th>
<th>Evidence</th>
</tr>
</thead>
<tbody>
<tr>
<td>Indicators</td>
<td></td>
<td>----------</td>
</tr>
<tr>
<td>The worker:</td>
<td></td>
<td>----------</td>
</tr>
<tr>
<td>a) Identifies:</td>
<td></td>
<td>----------</td>
</tr>
</tbody>
</table>
|   - The range of people involved in the communication. | • Influencing Skills | 1. Presenting at a Conference:  
|   - Potential communication differences. | • Change management | • Copy of Presentation  
|   - Relevant contextual factors. | • Negotiating Skills | • Reflective Log – Details of audience, analysis of performance at the conference, any communication differences and barriers you had to overcome. Identify things you did well, any challenges and how any changes you would make in the future to improve your performance.  
|   - Broader situational factors, issues and risks. | • Political awareness | 3. On the job activities/Work Products  
|                                  |                                  | • Reflective Record – on how you have dealt with different situations e.g. any barriers to communication |
b) Communicates with people in a form and manner which:
- Is consistent with their level of understanding, culture, background and preferred ways of communicating.
- Is appropriate to the purpose of the communication and its longer-term importance.
- Is appropriate to the complexity of the context.
- Encourages effective communication between all involved.
- Enables a constructive outcome to be achieved.

c) Anticipates barriers to communication and takes action to improve communication.

d) Is proactive in seeking out different styles and methods of communicating to assist longer-term needs and aims.

e) Takes a proactive role in producing accurate and complete records of the communication consistent with legislation, policies and procedures.

Communicates in a manner that is consistent with legislation, policies and procedures

- Stakeholder engagement: become a representative of your library network on your organisation’s stakeholder board
- Library Managers’ strategy meetings: a chance to exchange news and best practice and learn from others. Opportunity for high level discussion of library policy

improve your performance

2. Courses
- Certificate – Negotiating Skills
- Learning Log – what you learned on the negotiating skills course, how you have put any changes into practice, both personal and procedural.

3. On the Job Activities/ work products at this level reflective logs are probably the most effective way of demonstrating your skills
- Reflective Log – analysis of a situation for example when you were able to improve communication techniques/channels used

4. Working with a Mentor
- Learning Log – Detail learning outcomes from discussion with mentor for examples ways of overcoming barriers, appropriate methods of communicating. Details how you have applied the learning and if it went well.
Tick to indicate if Appraisal is for:

- Annual Appraisal
- Foundation Gateway (FG)
- Second Gateway (SG)

Appraisal & Development Review
KSF Progress Report – Core Dimensions

Tick to indicate what you are using this form for:

- Self Assessment
- Line Manager Assessment
- Agreed Progress Report
Communication - Level 4

<table>
<thead>
<tr>
<th>TITLE OF POST: ____________________________</th>
<th>DATE BOOKED FOR APPRAISAL ____________________________</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>Communication - Level 4</th>
<th>Tick as appropriate</th>
<th>Example or Evidence (Notes or reference / sheet number)</th>
<th>Development Required (Give example)</th>
</tr>
</thead>
<tbody>
<tr>
<td>FG/SG/SG</td>
<td>ACHIEVED</td>
<td>YES/NO</td>
<td></td>
</tr>
</tbody>
</table>

Develop and maintain communication with people on complex matters, issues and ideas and/or in complex situations.

a: identifies:
- the range of people involved in the communication
- potential communication differences
- relevant contextual factors
- broader situational factors, issues and risks

b: communicates with people in a form and manner which:
- is consistent with their level of understanding, culture, background and preferred ways of communicating
- is appropriate to the purpose of the communication and its longer term importance
- is appropriate to the complexity of the context
- encourages effective communication between all involved
- enables a constructive outcome to be achieved
c: anticipates **barriers** to communication and **takes action to improve communication**

d: is proactive in seeking out different styles and methods of communicating to assist longer term needs and aims

e: takes a proactive role in producing accurate and complete records of the communication consistent with legislation, policies and procedures

f. communicates in a manner that is consistent with legislation, policies and procedures.
Library aims and objectives
- Discussion paper for meeting with Senior Library Team 22/09/06
Team - at the library team meeting the team felt main objectives were:

Lines in blue are Library Manager’s priorities
Enabling the library staff to cope with change
  Done through weekly team meetings
  Dorothy reports back from Trust meetings
  We do more forward planning as a team

Actions from the publicity group and other project groups

Library staff continue with training for their own CPD

Library IT networks are robust – new network is installed

LIBQUAL responses (+ paper survey from 2005)
Need to ensure long term plans in place in response to user need
  Identify the range of users who responded
  Out of hours access
  More books
  Quiet study area – respect for people using the library
  Computer access improved
  More e-journals

QUALITY & AUDIT
Work to the quality strategy we agreed at our team meeting
Achieve requirements of the Helicon accreditation scheme
Work to the SWRLIN library specification
Work to the Academy library specification
National Service Framework for health libraries and information services

WDC Workstream
Seven areas:
  Patient-centred health care
  Public health agenda
  Supporting primary care
  Health and social care education
  Workforce development
  Implementation of IT

Local strategic aims:
    (integrated assessment)
Support for Primary Care Objectives
Health promotion unit support
Better standards for better health – has information implications

Primary Care objectives 2004-2006 – all changing with the merger into one PCT

National Service Framework targets on CHD, Diabetes, Older People, Cancer Services and Mental health are set as priorities for all local PCTs. The library will support these through resource provision in these subject areas.
Frequently asked questions

How much Evidence should be submitted?

This will depend on the purpose for which the portfolio is intended. Guidance is given by some organisations such as CILIP, and this should be followed. In other cases, the selection will be made to demonstrate the breadth and depth of evidence to meet the needs of particular situations including appraisal, personal development, evidence of achievement.

What sort of evidence should be included?

Again, if there is guidance, this should be followed. In many situations, there is no prescription as to format or length. The portfolio should be clearly set out to make the evidence easy to follow, to demonstrate the main competences and to make sure that coverage is sufficient, authentic, current, relevant and valid. Evidence may be print, electronic, audio visual or other appropriate formats that meet the needs of the portfolio.

How should the evidence be organised?

Guidelines should be followed where given. Order should be clear, logical, progressive, incremental.
Resources for Portfolio Development

Websites
Bolton NHS Primary Care Trust Life Long Learning Project Resources - portfolio building. [accessed 18 February 2008]

CILIP Qualifications and professional development. [accessed 18 February 2008]

Newton, Karen, Barker, Carol., Kidds, Martin., & Campbell-Hayes, Carol., Building your portfolio. [accessed 18 February 2008] A large file to download but contains many valuable tips

Books

Chapter 6 on profiles and reflective practice is a useful overview.

Pearce, R. 2003, Profiles and portfolios of evidence Nelson Thornes, Cheltenham. Contains useful material on learning styles

Practical aptly describes this book!


Appendix 1: Objective setting: CILIP Framework

<table>
<thead>
<tr>
<th>ELEMENT D</th>
<th>MEASURABLE OUTCOMES</th>
</tr>
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<tbody>
<tr>
<td>Academy Development</td>
<td>Group training – project group to develop these at two library sites</td>
</tr>
<tr>
<td></td>
<td>Evening opening – see that this happens and when secure publicise it</td>
</tr>
<tr>
<td></td>
<td>Actively seek feedback from local Universities from students on placement</td>
</tr>
<tr>
<td>Marketing and Publicity</td>
<td>Support the strategy developed with Assistant Librarian. Keep requesting progress reports from team. Turn these into information for the Trust Board.</td>
</tr>
<tr>
<td></td>
<td>Oversee Assistant and the LIBQUAL survey</td>
</tr>
<tr>
<td>Team Leadership, Management</td>
<td>Maintain regular training events and team meetings – this enthuses library staff is why such a small team has such a big impact on learners in the Trust.</td>
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<tr>
<td>and support</td>
<td></td>
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<tr>
<td>National Library Services</td>
<td>Represent Health Libraries Group in planning the National Conference. Train for mentorship of new librarians</td>
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<tr>
<td>Development</td>
<td></td>
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