Health Education

TOOLS *of the* TRADE

3

Tools for Enhancing Your Professional Development

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Kathleen Jahn Schmalz, EdD, RN, CHES

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Cultivating Conference Confidence: Getting the Most out of Attending Professional Meetings

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T he two of us have been going to professional conferences for more years than we care to admit. Sadly, it took us a while to learn how to make the most of them, because our only teacher was ByTrial AndError. We all know how hard ByTrial AndError can make things. That is why we created this tool: to save new professionals and seasoned conference-goers the time and effort of figuring out for themselves how to make the most of attending professional conferences.

Another lesson we've learned over time: Seriously consider setting aside a specific percentage of your annual income to attend professional conferences regularly. Whether they are across the street, across town, across the state, across the country, or across the ocean, they will enhance your professional and personal development. Conference-related costs are not just expenses—they are investments you make in yourself.

We hope this tool inspires you to attend health education and promotion conferences as often as possible and helps you make the most of all of them. Although this list may not be all-inclusive, it certainly should provide a useful springboard for further discussions between supervisors and staff, colleagues and coworkers, and professors and their students about how to prepare for, thrive during, and follow up after professional conferences.

Why Go to Conferences?

- Present scholarly work
- Earn continuing education credit
- Identify new research ideas, information, trends, data, and best practices
- Reenergize
- Network; renew connections
- Mentor/be mentored
- Job hunt

- Meet colleagues
- Pick up free exhibit materials
- Recruit new clients or project partners
- Catch up on latest profession news
- Change of pace/get away
- Socialize
- Start/end vacation
- Be seen/noticed

Factors Influencing Choice of Conferences

- Sponsor
- Theme
- Price (investment)
- Location/site
- Certification or license requirements
- Number of continuing education credits
- Workshop titles
- Program/session format(s)
- Speakers
- Time of year
- Day(s) of week
- Social events
- Banquet/gala site
- Award recipients

Roles in Which to Attend

- Oral presenter (see Ovation-Worthy Orations: Enlightened Lecturing Techniques)
- Poster session presenter (see Poster Session Fundamentals: Becoming a Proficient "Poster Child" for Health Education)
- Exhibitor
- Participant
- Local association representative
- Association officer/leader
- Mentor/mentee

Conference Components

- Preconference
  - Conference service activity benefiting host city
  - Governance meetings
    - May be open to members—check first
  - Workshops/institutes: longer/more intensive sessions (may require extra fee)
  - Association business/committee meetings
- Main conference
  - Association committee meetings
  - Plenary sessions: for all participants
  - Concurrent workshops: theme-focused simultaneous sessions; limited seating; chosen when registering
  - Poster sessions: graphic/pictorial presentations of information; authors sometimes available
  - Roundtables: facilitated informal topical discussions
- Social events
  - Opening social
  - Awards banquet for achievers in specific areas
  - Wellness events
- Postconference
  - See preconference

Before the Conference

Get Ready

- Clarify purpose/intent of attending
  - Know why you're going, what you want from conference
- Decide who, if anyone, to go with
  - Family member
  - Friend(s)
  - Coworker/colleague
    - Clarify obligations, plans, time commitments
- If alone, find roommate via sponsoring organization/on own
- (Re)Order business/networking cards
  - Useful for job/consulting/internship-seekers

Plan Budget

- Determine funding/reimbursement sources
  - Financial aid options/scholarships
  - Employer support (professional development expense)
  - Tax deductible expense

Budget/Expense Items

- Travel
  - Local transport
- Hotel
- Meals/snacks
- Special events
- Garage
- Tips for
  - Housekeeping (each morning)
  - Porter (per bag)
  - Taxi drivers
  - Waitstaff
  - Helpful staff (e.g., concierge, parking attendant, coat check clerk)
- Souvenirs
- Entertainment

Registration

- Register in advance
- On-site registration more expensive
- Sign up for
  - Pre/postconference events
  - Personal/group wellness events
  - Mentoring program
    - To be mentor/mentee
    - Based on skills/experience/needs
  - Social events
- Join appropriate special interest groups (SIGs)/caucuses

Cover Work/Home Responsibilities

- Arrange work coverage
  - Have work reassigned, not ignored
  - Limit work backlog on return
- Arrange personal life
  - Plan care of significant others
  - Pay bills coming due while away
- Decide what to take (see "Pack Smart" below)

Make Travel Arrangements

- Seek out bargains
- Beware early discounts; late fees/penalties
  - Order tickets/travel packages
  - Find/renew passport, visa
- Pace travel, sleep plans
- Rent car/have mechanic check yours
- Confirm everything before leaving

Make Lodging Arrangements

- Research hotel room(s) price/location
- Reserve room(s)
  - Plan to arrive day/night before, if possible
  - Book before sponsor's room block deadline expires
    - Cancel/change dates at no cost later if within hotel deadline

Option 1: Conference Hotel

- Possible pros
  - Reduces travel: Most conference events take place there
  - Facilitates attending conference social events/other activities
  - Can rest, use room between sessions
- Possible cons
  - Less privacy
  - Less down time
  - Higher cost—usually

Option 2: Stay Elsewhere

- Possible pros
  - Better financial package
  - Privacy
  - Near other attractions
- Possible cons
  - Additional ground transport costs to/from conference hotel
  - Less access to colleagues
  - Sense of isolation

Study Conference Agenda

- Revisit professional/personal goals
  - Know how attendance will enhance job performance/value
- Review session titles, descriptions, speakers, objectives
  - Avoid missing valued event/session/activity
- Plan time strategically
  - Cannot be everywhere
  - Must miss some sessions/activities
  - Prioritize options based on attendance goals
  - Create personal schedule
    - Write out/use organizer's scheduling tool
- Prepare for potential "paperless" conference (organizer provides no print materials)

- Access conference Web site before departure
- Download essentials to electronic device: conference site information, agenda, exhibitors map, session abstracts (for back-up if no hotel Internet connection)
- Print key materials

Pack Smart

- Agency materials/give-aways
- Clothes
  - Business/casual clothes for meetings
    - Layerable
  - Comfortable low-heeled shoes
  - Casual clothes for free time
  - Something fancier for special events
  - Swimsuit; pool shoes
  - Exercise clothes
  - Sneakers
  - Sandals
  - Sweater/shawl
  - Second pair of glasses/contact lenses
- Business/"networking" cards
- Range of electronic devices for documenting, communicating, computing, recording, traveling, reading
  - Appropriate chargers
  - Accessories (e.g., stylus, covers, keyboards, personal wi-fi/MiFi® units/jetpacks)
- Office supplies: sticky notes, highlighters, pens, clips, notebook/paper
- Sugarless mints, gum, healthy snacks for midday energy boost
- Medications, vitamins
- Toiletries: expensive in hotels, sometimes provided
- Plastic bag(s) for damp/washed items when leaving
- Carry-all/briefcase/messenger bag
  - Tote for conference/exhibit materials
  - Often free from conference sponsor/exhibitor

During the Conference

Network

- Review participant list—set networking goals
  - Decide strategically when to sit with friends, when to mingle with others
- Break away from friends/familiar colleagues
  - Meet new people
  - Strangers = friends you have yet to meet
- Attend "First Time Attendee" sessions/events
  - Make new friends, connections

- Connect with people you can help/can help you
- Go with another person to sessions/events
  - Eases entry if shy, nervous
- Write promises made to others on their business cards/conference participant list
- Connect through social networking channels (e.g., LinkedIn®, Facebook®)

Set Daily Goals

- Decide
  - What information to gather
  - What resources to collect
  - Who to meet; why
  - What information to share with whom
- Create schedule based on priorities
- Visit job bank; assess job trends

Make the Most of Sessions

- Arrive on time
- Sit further inside room/up front
  - Prevents being disturbed by latecomers
  - Hear/see better
  - Increase odds of getting speaker handouts
- Use only 1 seat, not 2
- Greet whoever sits next to you
  - Later, exchange networking cards
- Turn off/mute phone/other devices
- Prepare to take notes
- Be attentive
  - Do not chat during sessions
  - Explain to talkers you cannot hear presenters
  - Think of/jot down questions to ask
- Post new insights on blog/social media (e.g., Twitter®, LinkedIn)
  - Positive comments only: be professional
  - Give credit to presenter(s)
- Leave quietly/quickly if/when session disappoints
- Before leaving look around/take all personal items
- Use breaks/meal times for phone calls

Reduce Expenses

- Look for free hotel Wi-Fi
- Exchange volunteer work for conference registration discount
- Stay at hostel
- Walk; take buses, trains, trolleys; share cabs
- Search Internet for free networking cards

Increase Enjoyment of Experience

- Choose hotel with fitness facilities
- Take sightseeing tours
- Talk to people: professionals, community members
- Judiciously visit community/local organizations

Care for Self

- Have fun
- Expect exhaustion/exhilaration at day's end
- Avoid heavy/rich/high carbohydrate meals (cause sluggishness)
  - Find fruit/grocery store: healthy snacks
- Get enough sleep (energize for next day)

After the Conference

Immediately

- Apply for continuing education (CE) credit at conference/online/via mail
- File/save:
  - Conference materials, portable storage device (e.g., thumb drive)
  - Participant list: future networking/commitment follow up
  - CE credit certificate(s)
- Send mentor(s) thank-you note
- Follow up on commitments/promises made
- Send/respond to invitations for online connections
- Organize receipts
  - For reimbursement, tax purposes
- Apply for reimbursement

Later

- Scan/enter networking card information in contact database
- View posted conference presentations
- Send information/resources/copies of own work to relevant contacts periodically
- Stay connected by sharing relevant articles/links/resources

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For More Information

In this e-book:

- Abstract Art: *How to Write Competitive Conference and Journal Abstracts*

- Ovation-Worthy Orations: *Enlightened Lecturing Techniques*
- Poster Session Fundamentals: *Becoming a Proficient "Poster Child" for Health Education*

Poster Session Fundamentals: Becoming a Proficient "Poster Child" for Health Education

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People often make the mistake of turning down an invitation to present their work at a professional conference because it was accepted as a poster session rather than as an oral presentation. They think a poster is less prestigious, powerful, or popular than a presentation, or they don't see a poster as a benchmark in preparing to write an article. Maybe they don't think they have the technical savvy to design and produce a dramatic and compelling visual or maybe they simply can't be bothered with mailing or schlepping a poster to an event.

Forgive our proselytizing, but now that we have "seen the light" we are eager to share what we've learned and to encourage colleagues to take advantage of the poster session format. Here's how we see the choice.

1. We can compete with dozens of expert speakers for a limited number of 12-minute slots in a 60- to 90-minute session. This session may be attended by five to 50 people with diverse interests. Presenters often have to wait until the end of the session for questions asked, if not forgotten as participants run to get a decent seat at the next session.

OR

2. We can apply for a more inclusive venue and let our work be on public display for hundreds of colleagues for 30 minutes to 24 hours. Poster sessions usually offer the opportunity for a dedicated time slot in which to present, discuss, and answer questions from people who have specifically sought us out.

To us, both oral presentations and posters are great opportunities. We have learned that having a poster at a meeting is not a consolation prize—it's a great chance to move up.

The purpose of this tool is to present researchers, practitioners, and students with basic steps and resources for designing visually appealing, informative posters. The tips are a combination of recommendations from publications and Internet sources that we found particularly helpful to us, recommendations of experts who have coordinated poster sessions for years, and our own experience.

As committed converts, we are so enthusiastic about poster sessions; we may even do a poster session on poster sessions some day! Enjoy!

Definition: Poster Session

- Display of multiple posters
- Reporting on research/interventions
- During specified conference times
- With (possible) opportunities for author(s)-viewer(s) interaction

Definition: Poster

(Block, 1996; Purrington, 2009; Stoss, 2008)

- Oversized poster describing research findings/program
    o Readable in 10 minutes
    o Not manuscript paste-up
- Format
    o Passive: stand-alone presentation for passersby to view
    o Interactive: author(s) discuss data/interpretations 1-on-1 or small group
- Promotes achievements of author(s)
- No single recipe for success

Poster Author(s)

- Researchers
- Program directors
- Faculty
- Students

Poster Session Settings

(Pennsylvania State University, 2008; Purrington, 2009)

- Events: scientific/annual meetings, expositions, workshops, symposia
- Locations: hotels, colleges, convention centers

- Sites: exhibition hall, classroom, hallway/passageway, lobby, room, balcony/terrace
- Site conditions: free-flowing/forced route; crowded/isolated; hot/freezing; noisy/dead quiet; over-/under-lit; prime location/inaccessible; social/academic setting
- Timing: daylong, coffee breaks, social hours, special set-aside times

Poster Components

(Block 1996; Purrington, 2009)

- Must be easy to find, easily read (telegraphic)

Title

- 1–2 lines
- Catchy, highlights issue/approach/"players"

Abstract

- None, unless rules require it (≤50 words)
- When in conference program: redundant!

Introduction (<200 Words)

- Attention grabbing
- Minimum background information
- Just key definitions
- Context for research/program
- Approach described/justified
- Clear hypothesis
- Illustration highlighting aspect of research question/program

Materials/Methods (<200 Words)

- Describe
  - Experiment/intervention
  - Equipment/methods/instruments
  - Statistical analyses used—how they allowed you to address hypothesis
- Include
  - Figures/tables illustrating experimental design
  - Flow charts summarizing reaction steps/timing of experimental procedures

Results (about 200 Words)

- Largest section
  - Report experiment/program outcomes
  - Briefly describe qualitative/quantitative results

- Highlight data analysis that more specifically addresses hypothesis
- Include supporting charts/images with clarifying legends

Conclusions (about 300 Words)

- Remind reader of hypothesis, results
- State (quickly) if hypothesis supported or not
- Discuss (persuasively) why results conclusive/interesting
- Emphasize relevance of findings to other work/profession

Literature Cited (< 10 Citations)

- Follow standard professional format *exactly*
- List journal articles supporting relevant facts

Acknowledgments (40 Words)

- Cite specific contributions of specific individuals to project
  - No job titles
- List funders
- Disclose conflicts of interest/conflicts of commitment

Further Information (20 Words)

- Author(s) e-mail address, Web site address/URL for poster PDF

Potential Audience/Viewers

- Peers/colleagues
- Future employers
- Networkers
- Media representatives
- Students
- Faculty
- Passersby
- Party-goers/lost tourists (may have useful connections)

Poster Session Benefits

(Purrington, 2009)

- Allows author–viewer interaction
- Reaches people with other specialties not attending oral presentations on same topic
- Gives author(s) flexibility; don't always need to be there

- Provides easier alternative for anxious, less experienced author(s)
- Travels/portable
- Can be used multiple times/ways
  - Department hallways/offices
  - Student poster competitions
  - Campus events ("Discovery Day," institutional/departmental open house, homecoming)
  - Other conferences
- Can win prize: "Best Poster," "Most Innovative Topic"
- Enhances resume; portfolio
- Encourages creativity
- Can be shared for perpetuity, posterity, feedback, for free (e.g., http://www.ePosters.net)

Production Software Options

(Pennsylvania State University, 2008; Purrington, 2009)

- Page layout/graphics packages available
- Get poster size specifications from event sponsor
  - Remember, software programs have different size limitations
  - Look for text wrapping/text flow among associated text blocks features
- Page layout applications
  - PowerPoint
  - QuarkXPress®
  - Adobe® InDesign®
  - LaTeX
  - PosterGenius™
- Graphics packages
  - Adobe® Freehand®
  - Adobe® Illustrator®
  - CorelDRAW®
  - Inkscape—free!
  - Omnigraffle
- Poster template files available on Internet
  - Search: "poster template" + application name (e.g., Microsoft PowerPoint)

Desired Attributes

(Block, 1996; Purrington, 2009; Radel, 1999; Stoss, 2008)

- Well designed, eye-catching, engaging (Stoss, 2008)

Layout

- Content influences design
- 36" x 56"
- 20% text, 40% graphics, 40% empty space (Radel, 1999)
- Clear "travel" directions through sections (Block, 1996)
  - Columnar format: read top to bottom first, then left to right
  - Number poster pieces (1, 2, 3...) so sequence obvious
  - Test: 2+ people simultaneously read poster moving left to right, not exchanging places
- Legends located by relevant figures

Text

- Goal: consistency, uniformity; clean, readable look (Block, 1996)
- Font
  - Legible 6' to 10' away
  - Large size—title 48, copy 28
  - Title/heading: san serif font (Arial, Helvetica)
  - Headers: bold, larger font size
  - Body copy: serif font (Times New Roman, Palatino, Garamond)
  - Acronyms, numbers in text: reduced font size by 2–3 points
  - Italics rather than underlining
- Layout
  - Line spacing set at exactly 1
  - Single space between sentences
  - Tabs set manually with ruler
  - Text box width: about 40 characters/11 words/line
  - Bottom
    - Less important/politically necessary content
    - Author contact information: name, institution, e-mail, social media moniker (e.g., Facebook username, Twitter handle)
- Writing
  - ≤ 800 words
  - Lists of sentences, not blocks of text
  - Judicious use of important bulleted points
  - Text block limit: 9 sentences
  - Active voice (Radel, 1999)
- Judicious edits—"When in doubt, leave it out"

Graphics

- Clear charts, revealing photographs, simple tables, illustrative images
- Simple, labeled graphics; highlight relationships, not data
- Story enhancers, not decorations
- Short informative graph titles
- Y-axis labels aligned horizontally
- Graph axis labels formatted in "sentence case"
- Graphs: white backgrounds, black grid lines, boxes
- 2-dimensional data displayed in 2D only
- Internet graphics often pixilated—use with caution
- Thin gray/black border around photos

Colors

- Aim for tasteful, sensible, intuitive (Block, 1996)
- Avoid dark backgrounds, red and green together
- Use symbols/patterns, not colors
- Be mindful of color contrasts
  - Avoid combining bright colors
    - Example: no dark red on navy blue; no chartreuse on light grey
  - Avoid excessive variations (Block, 1996)

Logos

- Not needed, institution(s) listed below title

Enhancements

- Button-activated taped sounds
- Braille summary
- Scratch-n-sniff
- Odor bags: Put odor in plastic bag next to invitation: "Open bag, if you dare"
- Texture variations: Glue actual object onto poster
- "Hidden panel": Use hinged piece of poster board with instructions to "Lift panel for answer" over hidden area
- Bag of individually wrapped treats attached to board; attracts/rewards viewers
- Gimmicks must not detract from/trivialize poster

Pretesting Posters

- Hard copy
  - Produce drafts (as close to actual size as possible)
  - Create well in advance of target event
  - Test impact (while absent) with 2-6 representatives of intended audience
    - Ask viewers to comment via sticky notes on
      - Prose style
      - Format
      - Color
      - Readability
      - Attractiveness
      - Word count
      - Idea flow
      - Figure clarity
      - Font size
      - Spelling
      - Layout
      - Recognition of subject/purpose in 20 seconds (Pennsylvania State University, 2008)
      - Enhancements
- Electronically
  - Post poster on Flickr.com; request comments/feedback
  - Send without comments/explanations to friends for review/feedback

Poster Presentation Tips

- Showmanship counts (Block, 1996)
- Poster presentation = professional activity/work; act accordingly

What to Bring

- Poster pieces protectively wrapped
- Can of Spray Mount™ (artist's adhesive) to dry mount/reposition poster segments
- Extra push pins to hang envelopes
- Correction fluid (e.g., Wite-Out®) to cover typos
- Black marker to correct typos
- Name tag
- Business/networking cards
- Small envelope for own/others' business/networking cards
- Large envelope for larger handouts, reprints, manuscripts
- Pad of paper with hard back
- Pens
- Handout: 2-sided
  - Side 1: color 8.5" x 11" mini-poster; number page: 1 of 2
  - Side 2: conference name/date/sponsor; poster title, abstract, additional points, contact information; number page: 2 of 2

Set Up

- Check conference schedule/poster presenter instructions for set up/break down time
- Budget time to mount poster properly
- Bring poster, pins, tape, envelopes, business/networking cards, enhancements
- Arrive early in set up time slot
- Post title first if poster includes multiple components (Block, 1996)

Appearance

- Wear colors used in poster; don't clash
- Dress in business formal/casual depends on conference culture
- Wear name tag that associates you with poster
- Do not chew gum/tobacco
- Avoid carrying/drinking beverages
- Keep hands out of pockets; avoid key/coin jangling

Expectations

- Distractions—competition for viewers' attention
- Success
  - Viewers stay 3–5 minutes (Purrington, 2009; Block, 1996)
  - New contacts; new ideas, projects
- Failure: "This is really interesting—I'll definitely come back later."

Presentation

- Hook viewers instantly: Pose compelling unanswered question
- Give 1-sentence overview why project interesting/relevant; point to figure
  - Give 3–5 minute talk; refer to other figures
- Stand to side of poster; don't block it; be able to make eye contact with passersby
- Give people space; no hard sell—await/invite questions
- Present as if to prospective employer
- Don't use notes
- Speak directly to viewers
  - Don't read or point to text
  - Point to illustrations/specific parts to indicate progressing through talk
  - Avoid vagueness: "This figure shows our main result."
  - Be concrete: "Study group participants did 25% better than control group members."

- Don't let anyone monopolize your attention
- Be alert; respond to others' (however tentative) interest
- Ignore no one!
- If viewers arrive late, finish presentation for early arrivers first
- Thank viewers for visiting
- Stay until author(s) presentation session ends—don't leave early

Poster Session Follow Up

- Fulfill any commitments/promises made to viewers
- Add poster to your resume; add to professional portfolio
- Find additional uses
  - Post at work, use as teaching tool, use as basis/outline for article

Conclusions

- Benefits usually outweigh cost, time, effort—if done correctly
- Posters with/without author presentations
  - Promote professional development
  - Require as much/more planning than oral presentations
  - Make powerful first impression in < 10 seconds
  - Are well worth effort involved
  - Enhance marketability
- Potential powerful professional launch pad for you/your ideas/research

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"Oh, the Places You'll Go!" Work Preferences and Personal Assets Assessment Tool

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Looking to see what's next in your work life? Decisions, decisions, decisions! For many, the only thing scarier than having to make a career decision is a fear of making a "wrong" decision. As health educators, we know good interventions are based on thorough assessments. Similarly, as prospective health education and promotion employees, it makes sense to begin any work search with a work-life preference and personal assets self-assessment.

Each time you look for work, it's a good idea to do a new self-assessment. Why? Three reasons: first, the attributes that employers value depend on the nature of work to be done and that is constantly changing; second, over time and with experience, your own needs, priorities, and values change; and third, it's very likely that the needs, priorities, and values of employers change as well.

While all these changes are going on, the questions we need to ask ourselves about what will make work rewarding for us seem to remain fairly constant—and are listed in this tool. It's our answers that change over time as we change and as our circumstances change.

This tool's inspiration comes from the excellent classic career development books of Jane Ballback and Jan Slater, Daniel Moreau, and Helen Harkness; the tool title, of course, is from Dr. Seuss! The ideas here have stayed current over time and are very valuable. Since its original publication we have added recent Millennial generation considerations offered by the National Career Development Academy, and we have included additional ideas and alternatives based on our own combined work-life experience of 10 careers and 30 jobs.

We make work-related decisions throughout our life...over and over again. According to Moreau (1996), we must not only take charge, but stay in control in the face of changing work conditions by having career-development maintenance programs that include networking, exercise, and stress management. Throughout your work life (which may include having one or more jobs and/or careers), assess your work preferences and personal attributes and see where they lead. With you at the controls, oh, the places you can go!

Kind of Work Sought

- Job
- Career
- Experience with personal meaning
- Self-actualization/being all you can be

Current Professional Development Stage

- Apprentice
- Entry level
- Established
- Professional
- Expert
- Distinguished
- Emeritus

Degree of Independence Desired

- Other's salaried employee
- Contractor for hire
- Independent consultant
- Home-based business owner
- Small business/franchise owner

Work Environment Preference(s)

- Indoors
- Outdoors
- Both

Sector Preference(s)

- Private sector
- Public/not-for-profit/independent sector
- Government/civil service

Industry Practice Preference(s)

- Business
- Computer/information technology
- Construction
- Consumer goods
- Cultural/arts
- Design
- Education/academic
- Entertainment/media/broadcasting
- Environment
- Fashion/image
- Financial
- Food/agriculture
- Government
- Health care/medical/public health
- Housing
- Hotel/leisure/recreation
- Nongovernmental organizations (NGO)
- Manufacturing
- Politics
- Real estate/development
- Research/data analysis
- Restaurant
- Retail
- Social services
- Sports
- Technical
- Telecommunications
- Textile
- Travel/transportation
- Utilities/energy

Work Setting Preference(s)

- Colleges/universities
- Community-based organizations
- Government agencies: city/county, state, federal, international
- Medical care facilities
- Not-for-profit health organizations
- Philanthropies
- Private industry/corporate

- Professional associations
- Schools: elementary, middle, high
- Other: _____

Organizational Size Preference(s)

(Society for Human Relations Management, 2008)

- Small: 1-99 employees
- Medium: 100-500 employees
- Large: 500+ employees

Organizational Culture Preferences

- Interaction
- Much or none?

- Chain of command
  - Structured or loose?
- Administrative structure
  - Flat or hierarchical?
- Decision making
  - Top-down or by all affected?
- Physical layout
  - To reflect rank or meet need?
- Dress
  - Formal or no rules?
- Ways of doing things
  - Traditional or innovative?
- Information sharing
  - Need to know basis or all know/transparent?
- Corporate identity
  - CEO-based or mission-based?
- Policies and procedures
  - Rigid or whatever works?
- Reward system
  - Predetermined or spontaneous?
- Recognition
  - Minimal or constant?

Client/Service Focus Preferences

- Administrators
- Adults
- Business leaders
- Children
- Clients/customers
- Colleagues
- Community leaders
- Displaced persons

- Families
- General public
- Health care professionals/medical specialists
- Individuals looking for fun/entertainment
- Legislators/legislative aides/policy makers
- Lesbian, gay, bisexual, transgender, questioning (LGBTQ)
- Men
- Minorities
- Nonhumans: animals, the environment
- Parents
- Patients
- People in need
- People in poor health
- People with addictions
- People with great financial resources
- Persons with disabilities
- Recent immigrants
- Refugees
- Small-business owners/entrepreneurs
- Seniors
- Subordinates
- Teenagers
- Upper management
- Vendors
- Women
- "Worried-well"/concerned healthy people
- Other: _____

Role Preference(s)

- Advocate
- Administrator
- Analyst
- Assessor
- Community organizer
- Consultant
- Coordinator
- Counselor
- Curriculum developer
- Data collector
- Educator
- Evaluator
- Facilitator
- Grant writer/fund-raiser
- Information source
- Leader
- Liaison

- Manager
- Marketer
- Material developer
- Media communicator
- Motivator/entertainer
- Negotiator/mediator
- Planner
- Program designer
- Public speaker
- Publicist
- Researcher
- Resource coordinator
- Resource person
- Risk communicator
- Supervisor
- Teacher
- Trainer
- Volunteer
- Other: _____

Work-Related Travel (Not Commuting) Time Preference

- 0
- < 25%
- 25-50%
- 50-75%
- > 75%

Content Area Preference(s)

- Specific disease(s)—acne to zoonotics
- Specific issue(s)—access to zoning
- History
- Philosophy
- Ethics
- Law/policy
- Economics
- Anthropology
- Other: _____

Schedule Preference

- Commitment
  - Part-time
  - Full-time
- Hours
  - Non-structured: dynamic, irregular
  - Structured: 9–5, evenings, nights, weekends, combinations

Position Preference

- Front line
- Supervisory
- Managerial
- Senior management
- Executive

Work Benefit Preference(s)

(Harkness, 1996)

- Respectful treatment
- Recognition
- People hear others' ideas
- Efficient managers
- Challenge
- Information on what's going on
- Chance to
  o Develop skills
  o Function independently
  o See efforts' end results
  o Advance
  o Develop relationships
  o Network
  o Mentor
  o Be creative
  o Lead
  o Learn
- Trustworthy subordinates
- Job security
- High pay
- Good benefits
- Sense of making a difference
- Prestige
- Accountability
- Visibility
- Power

Acceptable Work Expenses

- Office supplies
  o Reams of paper, folders, stapler
- Career coach
- Child care
- Clothing/uniforms/accessories
- Communication services
  o Fax, postage
  o Internet/data plan
- Commuting/traveling
- Education/training registration

- Goods and services (if too busy to do it yourself)
- Lodging
- Meals
- Professional memberships, subscriptions
- Refreshments
- Technology
  o Computer/cell phone/tablet (e.g., iPad)

Job Search Time Frame Preference/Reality

- Immediately
- Within 6 months
- Within 1 year
- Within next few years
- Whenever opportunity arises

Work-Choice Decision Influencers

- Health status
- Family
- Loans/debts
- Partner/spouse
- Geographic location

Your "Type"

(Ballback & Slater, 1996)

- Community engager
  o Energized by interactions
  o Challenged by group work
  o Volunteer to head groups, organize meetings
  o Leave workspace for "people fix"
- Data/digital
  o Perfer to gather/analyze data
  o Love data immersion
  o So into it, forget to eat
  o Happy to work alone
- Hands-on
  o Love to tinker/fix things/work with hands
  o Happy to work alone

Your Generation

(Goldman & Schmalz, 2006)

- Builders/Matures/Traditionalists/Veterans (born 1910-1943)
- Baby Boomers (born 1943-1960s)
- Baby Busters/Gen(eration) X (born 1960-1980)
- Bridgers/Gen Y/Echo Boomers/Millennials (born 1980-2012)

Preferred Coworker/Supervisor Generation(s)

- Builders
- Boomers
- Busters
- Bridgers

Personal Assets/Attributes

- Training
- Experience
- Credentials
- Maturity
- Transferable innate skills
- Self-management skills
- Temperament/personality traits
- Good health
- Attitude
- Motivation

Applied Skills/Strengths

(Workforce Readiness Project Team, 2006)

- Critical thinking/problem solving
- Oral communications
- Written communications
- Teamwork/collaboration
- Diversity
- Information technology application
- Leadership
- Creativity/innovation
- Self-directed personal development/lifelong learning
- Professionalism/work ethic
- Ethics/social responsibility

Staying Competitive/Best Practices

(National Career Development Association, 2013)

1. Keep Track of Accomplishments/ Skills/Projects

- Maintain portfolio/powerful collection of work
- Focus on opportunities/achievements

2. Develop/Expand Network

- Establish meaningful/lasting relationships
- Go beyond being LinkedIn®

3. Identify/Build Expertise

- Establish self as expert in field
- Speak/write/present in company/professional association
- Establish momentum

4. Update Career Goals

- Demonstrate self-directed/proactive career
- Identify short term obstacles; write career goals to address them

5. Keep Resume Current

- Review every 6 months
- Use to stay focused on career
- Account for all accomplishments
- If happy in job, update résumé for promotion/salary increase

6. Manage Professional Image

- Walk your talk
- Audit attire, language, gestures, tone; convey professional image
- Remember, communication 70% visual

7. Compile Personal Career Portfolio

- Enhance pride; foster admiration/respect
- Be creative

8. Keep Dynamic Contact List

- Maintain client, vendor, supplier list…most likely future job interviewers

9. Create Personal Board of Advisors

- Seek others' guidance to learn/grow relationships/expand thinking

10. Develop Leadership Style

- See self as emerging/future leader
- Dare to lead; learn from experience/study

Bonus:

11. Develop Global Perspective

- Recognize global pool of workers as competition
- Explore global issues/opportunities facing employers: cross-cultural management/communication

Skill Development Priorities

1. _____
2. _____
3. _____
4. _____
5. _____

Task/Assignment Preference(s)

1. _____
2. _____
3. _____
4. _____
5. _____

Tasks to Avoid

1. _____
2. _____
3. _____
4. _____
5. _____

Reminders

- Self-knowledge enhances choices
- Goal: "best match" between opportunity, self-interest
- Each decision is just for now; new decisions ahead
- Best results happen when people/jobs align
- Multiple positions/careers common
- Choices reoccur
- People/jobs are multi-dimensional
- Urgency of situation/decision may outweigh other needs
- Recommended reassessment every 3–5 years
- Work rarely optional; best if enjoyed

Note

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Forming and Developing Your Professional Identity: Easy as PI

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Abstract
Health education and promotion specialists and professional organizations have worked hard to successfully establish and maintain the status of health education/promotion (HE/P) as a unique and essential profession and to solidify practitioners' sense of professional identity. A professional identity is critical to a person's sense of self: It is about connecting with roles, responsibilities, values, and ethical standards unique to a specific profession. Professional identity is a complex issue in the HE/P profession; the distinction between personal and professional identities has been debated repeatedly over the years (e.g., should HE/P professionals be role models for clients?). The purpose of this Tool is to explain the concept of professional identity; provide new, emerging, and experienced HE/P with a greater understanding of what it means to have a professional identity; present processes and benchmarks of professional identity development; and offer specific tips and strategies for developing and enhancing an HE/P professional identity.

Keywords: *career development/professional preparation; workforce development; health education; health promotion*

Health education and promotion specialists and professional organizations have worked hard to successfully establish and maintain the status of health education/promotion (HE/P) as a unique and essential profession and to solidify practitioners' sense of professional identity (PI). A PI is critical to a person's sense of self: It is about connecting with roles, responsibilities, values, and ethics unique to a specific profession (Scott & Black, 1999). When PI is clearly communicated, potential clients' and employers' uncertainty about the HE/P professional's competence decreases and the HE/P professional's sense of self-worth and self-efficacy increases (Scott & Black, 1999).

Regardless of level of experience and training in the HE/P profession, every HE/P trainee or practitioner has some degree of PI (Scott & Black, 1999). It is something that we ourselves are responsible for developing, not something that automatically happens to us. Fostering PI requires help and time; throughout our careers, we must seek resources and guidance from our certification board, our professional associations, our professional preparation/training program instructors, and our colleagues.

Contrary to popular opinion, we believe that professional preparation in HE/P is necessary, but not sufficient, for a sense of PI as an HE/P specialist. Community health workers and medical social workers are two important examples of practitioners who may not have participated in formal HE/P professional preparation programs but often perform select health education functions (U.S. Department of Labor, 2013). However, PI as a HE/P specialist requires formal training and develops based on a number of psychological, social, and environmental factors specific to the profession.

The purpose of this Tool is to explain the concept of PI; provide new, emerging, and experienced HE/P professionals with a greater understanding of what it means to have a PI; present the stages and benchmarks of PI development; and offer specific tips and strategies for developing and enhancing an HE/P PI.

Definition: Professional Identity

- May differ by profession
- Beliefs/attitudes/understandings about one's profession/roles in work context (Adams, Hean, Sturgis, & Clark, 2006; Lingard, Reznick, DeVito, & Espin, 2002; Slay & Smith, 2011)
- Attribute-/belief-/value-/motive-/experience-based professional self-concept (Slay & Smith, 2011)
- Reflects sense of professional competence, commitment, connection (Adams et al., 2006)
  - Includes skills development, sense of belonging, cognitive/affective ability/capacity
- Developed via specialized knowledge/skills/experience acquisition, expansion, maintenance (Elman, Illfelder-Kaye, & Robiner, 2005)
- Internal/external developmental process
- Changes over time
  - Influenced by interactions/events/experiences

- Multiple (primary/secondary) professional identities possible
  - Examples
    - Dual-degree professionals: Q. Jones, MPH, MSW
    - One person, multiple credentials: M. Smith, RN, MPH, CHES, CDE, CSE, FACHE
    - Each credential: distinct knowledge/values
    - Maintenance: challenging, cost-/time-intensive

Select Theoretical Frameworks Influencing PI Development

(Adams et al., 2006; Elman et al., 2005; McAlpine, Jazvac-Martek, & Hopwood, 2009; Reed et al., 2008; Slay & Smith, 2011; VanDerLinden, 2005)

- Social/human capital theories
  - PI: commodity developed, marketed, used for professional/social advancement
  - Consider PI community resource
- Social identity theory
  - PI: "means" and an "end" (i.e., PI as both process and outcome)
  - Specific academic training/responsibilities/competencies/code of ethics
  - Provides professional entrée
  - Enables collaborations with other professions
- Social learning theory
  - Observation/role model-based professional norms (e.g., attitudes, values, behaviors)
- Social network theory
  - PI: created/reinforced through professional interactions/relationships (e.g., professional meetings, service, research, scholarship)
- Intrinsic/Extrinsic Motivation Theories
  - PI: provides inherent/independent rewards (e.g., emotional, psychological, social, vocational well-being)
- Pedagogy/instructional theory
  - PI foundation: competency-based curricula/professional development activities

Personal/Professional Identities Relationship

(McAlpine et al., 2009; Scott & Black, 1999; Slay & Smith, 2011)

- Controversial/complex topic (e.g., HE/P professionals as client role models)

- Not addressed by National Commission for Health Education Credentialing (NCHEC) HE/P code of ethics
- No positive health behavior role model mandate; recommendation only (Scott & Black, 1999)

HE/P PI Development Action Plan

Generic Initial Action Plan

(Adams et al., 2006; Elman et al., 2005; McAlpine et al., 2009; Reed et al., 2008; Shambaugh, 2000; VanDerLinden, 2005)

1) Future HE/P specialists may initially complete informal/paraprofessional preparation program

  - Certificate/nondegree programs
  - *Examples* (vary by state):
    - Family development credential
    - Community health worker
    - Lay health advisor
    - Promatoras
  - Input/influences:
    - Training workshop activities/readings/instructors/speakers/projects
2) To acquire formal HE/P specialist training/foundation, trainees should gather professional competencies, objective measures/assessments
  - Formal/professional preparation programs
    - HE/P undergraduate/graduate degrees (e.g., AS, BS, MEd, MS, MSPH, MPH, EdD, PhD, DrPH/DPH)
    - Input/influences:
- Course work: readings/assignments/projects
- Classroom interactions
- Extracurricular/professional development activities
- Service learning experiences
- Professional association membership/activities
- Faculty/practitioner mentoring (formal/informal)
- Professional conferences
- Internships/fieldwork/practical
- Work-study experiences
- Honor societies
- Graduate assistantships/fellowships/teaching assistantships
- Postdoctoral fellowships
- Research, teaching, campus/community service
- Conference attendance/presentations
- Fundraising/grant writing, publications

3) Newly trained or in-training HE/P professionals should perform ongoing, comprehensive self-assessment
    - Professional/personal knowledge, skills, values
    - Current certifications
    - Job- and internship-related performance standards/measures
4) Newly trained or in-training HE/P professionals should use self-assessment to develop Specific, Measureable, Attainable, Relevant, Timely (SMART) professional goals/objectives
    - Short-term (early career)
    - Intermediate
    - Long-term
5) HE/P trainees and professionals develop action plans (1-, 3-, 5-year plans) based on assessment, goals, and objectives
    - Identify suitable subject matter mentors
    - Tailor plan to include skills/content-based coursework/training
    - Collaborate on projects: mentors/affiliated individuals/agencies
    - Attend/present at professional conferences
    - Explore professional service/leadership, management, entrepreneurism, fundraising, event/strategic planning
    - Expand network within/beyond profession
    - Complete degree/earn Certified Health Education Specialist (CHES) degree

On the Practice Track

(Elman et al., 2005; Shambaugh, 2000)

1) Locate entry-level/degree-appropriate employment
2) Expand professional networks
3) Pursue service roles/responsibilities
4) Continue identifying/collaborating with mentors/colleagues in area(s) of interest
5) Partner with researchers; act as research/community liaison
6) Explore additional HE/P roles/responsibilities/activities where employed
    - Develop setting/audience/subject specialization competencies
7) Collaborate with other HE/P professionals: interagency consortium
    - Collaborate; represent profession
8) Maintain mentee relationships with mentors
    - Role model: supervisor/manager/executive
9) Seek out potential mentees (Lee, Dennis, & Campbell, 2007)

10) Maintain certification/recertify as CHES
    - Refine generic entry-level competencies
11) When appropriate, take master certified health education specialist (MCHES) exam; maintain MCHES certification
    - Master generic advanced-level competencies
12) Complete post-training HE/P enrichment/growth/training
    - May include education/experiences beyond "traditional" HE/P topics
13) Participate in volunteer/professional work throughout life cycle
    - On-the-job exposure/training
    - Role model observation

On the Academic Track

(Elman et al., 2005; McAlpine et al., 2009; Shambaugh, 2000; VanDerLinden, 2005)

1) Complete master's/doctoral training
2) Teach: guest lectures, teaching assistantships, internship seminars
3) Coordinate internships
4) Lead/copresent conference workshops
5) Conduct research/evaluations
    - Secure assistantships/internships
    - Author/coauthor scholarly publications/technical/community reports
6) Pursue postgraduate/postdoctoral fellowship/junior (new) faculty employment
7) Expand professional networks
8) Fulfill community/campus service roles/responsibilities
9) Identify research/scholarship/service mentors/collaborators
10) Establish/build relationships with community stakeholders/partners
11) Develop scholarship/research agenda
12) Identify principal/coinvestigator, consultant, funding/grant opportunities
13) Identify academic/community service opportunities
    - Thesis/doctoral committees
    - Faculty senate committees
    - Advisory boards
14) Involve students/mentees in scholarship/service (Lee et al., 2007)
15) Continuously develop professionally
    - Teaching
    - Scholarship
    - Community/campus engagement

16) Complete post-training HE/P enrichment/growth/training
   - May include education/experiences beyond "traditional" HE/P topics
17) Participate in volunteer/professional work throughout life cycle
   - On-the-job exposure/training
   - Role model observation

HE/P PI Development Benchmarks

(NCHEC, 2013)

- Passing CHES exam
- Completion of master's degree thesis
- Completion of doctoral dissertation
- Passing MCHES exam
- Peer-reviewed journal publication
- Professional association(s) membership
  - Professional association involvement/leadership role (e.g., committee member/chair; officer)
- Scientific work presentation at professional conference
  - Oral/poster session presentation
- Scientific work coauthorship invitation
  - Collaboration/team effort invitation
  - Author/coauthor publication
  - Author/coauthor citation/quotation(s)
- Advisory committee/board membership
- Professional (ethical, competent) practice
  - Continuing education credits/certificates/certifications

PI Development Outcomes

(Whitchurch, 2009)

- PI evolution with time/experience/seniority
1) Single-boundary professionals
   - Operate exclusively within HE/P professional roles/competencies
   - Sole and active identity is HE/P professional (Adams et al., 2006; McAlpine et al., 2009; Scott & Black, 1999)
     - Informed about HE/P profession
     - Engaged in HE/P competencies-based professional activities
     - Formally associated/affiliated with the HE/P profession
     - Adhering to HE/P profession's code of ethics
     - Advocating on behalf of HE/P profession

2) Cross-bounded professionals
   - Work in multidisciplinary environments
   - Actively use boundaries to
     - Expand health educator roles/functions
     - Remain within HE/P responsibilities/competencies scope
     - Enhance discipline's position in setting
     - Expand scope, niches, infrastructure development
3) Unbounded-professionals
   - Focus: multidisciplinary collaborations/projects
   - Emphasis not on HE/P role, responsibilities/competencies
   - Goal: meet team needs to achieve project goal
4) Blended professionals
   - Transdisciplinary/transprofessionals
   - Not bounded by single PI
   - Have multiple roles within a particular setting
     - Some HE/P focused
     - Others external/project focused
     - Value transcends HE/P PI

HE/P PI Development Opportunities and Resources

Opportunities

(Adams et al., 2006; Elman et al., 2005; McAlpine et al., 2009; VanDerLinden, 2005)

- Within academia
  - Mentorship
    - What: content, skills, professional values
    - How: coursework/clubs/service learning
    - Formal/informal peer collaboration (Lee et al., 2007; Shambaugh, 2000; VanDerLinden, 2005)
  - Advisement
  - Faculty interactions
  - Peer interactions
  - Conference attendance (Ghosh & Githens, 2009; Goldman & Schmalz, 2010)
  - Networking with scholars/practitioners
  - Teaching
  - Publishing research/practice articles
  - Agency fellowships/training opportunities
  - Community/professional service
- Outside academia
  - Mentorship
  - Role models

- Conference attendance (Ghosh & Githens, 2009; Goldman & Schmalz, 2010)
- Guest speaking
- Promoting achievements/accomplishments
- Volunteer work/professional association service

Resources

- Undergraduate/graduate curricula
- Program accreditation bodies
  - Accrediting Bureau of Health Education Schools
  - Commission on Accreditation of Allied Health Education Programs
  - Council on Education for Public Health
- Professional responsibilities/competencies
  - NCHEC (www.nchec.org)
- Professional associations
  - American Academy of Health Behavior: www.aahb.wildapricot.org
  - American College Health Association: www.acha.org
  - American Public Health Association: www.apha.org
  - American School Health Association: www.ashaweb.org
  - Coalition of National Health Education Organizations: www.healtheducationadvocate.org
  - Directors of Health Promotion and Education: www.dhpe.org
  - International Union for Health Promotion and Education: www.iuhpe.org
  - Public Health Education and Health Promotion Section, American Public Health Association: www.apha.org
  - SHAPE America (formerly the American Alliance for Health, Physical Education, Recreation and Dance): www.shapeamerica.org
  - Society for Public Health Education: www.sophe.org

PI Development Benefits

(Elman et al., 2005)

- Sense of professional membership
  - Belonging, connections, network, support, validation
- Clearly defined practice scope/boundaries
  - Responsibilities, competencies, code of ethics
- Professional development expectations

- Continuing education, (re)certification

PI Development Challenges

- Contradictory/ambiguous situations/experiences trigger self-reflection/questioning, identity reshaping/redefinition (Adams et al., 2006; Slay & Smith, 2011)
- Discourse/discussion yield constant reconstruction/alterations (Adams et al., 2006)
- Adoption of dominant profession's views by team (Lingard et al., 2002)

Summary

- PI: key objective of professional preparation/continuing education/professional development
- All HE/P practitioners somewhere on PI spectrum (weak PI to strong PI)
- Each responsible for own PI development plan
- Requires regular routine reflection/reassessment; reformulation/redirection of PI action plan
- PI development: never-ending process

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