Abstract:

Career advancement depends to a large degree on maintaining competence, which in turn depends on continuing learning. Information and communication technology, together with globalization, have made it more possible than ever to choose from a wide array of learning resources. While increased choice is welcome, it is also problematic in that it makes it harder to select the most appropriate options. Taking a systematic approach, such as designing a personal professional development plan, offers a solution to the dilemma. This paper provides background on learning plans and gives examples of guides that can be used for developing professional development plans, either as a career change strategy or for current performance enhancement.

Keywords: Continuing professional development, Career advancement, Professional development plan (PDP), Librarians

Introduction

What is a “professional development plan (PDP)”?

At its most basic, a PDP identifies what one hopes to achieve in a career within a given time frame and lists steps toward reaching the objective. It specifies skills and knowledge to be gained, together with resources needed for learning. Sometimes used interchangeably with “personal learning plan” or simply “learning plan”, the term PDP tends to be preferred when the focus is clearly on career rather than broader personal growth. Nevertheless, consideration of an individual’s values, characteristics and talents may well be germane to career planning. A career plan may also go
beyond learning objectives to include such considerations as job location, family, or health, but the focus here is on the learning required for goal achievement.

Following a brief discussion of PDPs in the context of continuing education (CE), this paper adapts a template that librarians can use to design their own plan. The original template is the workbook entitled *Creating a Professional Development Plan* (EDUCAUSE n.d.), which came to my attention via an essay on career management (Markgren 2014). The template can be found on the EDUCAUSE website as part of their career development program, and is used here with permission. Although the mission of EDUCAUSE is focused on the role of information technology in higher education, the activities and publications of the organization are in many ways compatible with the concerns of library/information professionals of all types. The workbook is generic enough to be easily adapted for contexts other than higher education. It can be used on one’s own, although some consultation with colleagues is highly recommended. It also lends itself for use in staff development programs, as well as in workshops organized by professional associations such as the IFLA Continuing Professional Development and Workplace Learning (CPDWL) Section. Before reading further in this paper or attempting to follow the workbook as adapted for CPDWL in this paper, it is helpful to scan the original on the EDUCAUSE website (EDUCAUSE n.d.).

**Advantages and disadvantages of PDPs**

In brief, the workbook reflects the belief that individuals must commit time and effort in order to understand themselves as workers and learners. This understanding will make it possible to achieve career success through systematic planning and learning. It is taken for granted that people desire to derive satisfaction from work and aspire to continue to learn and grow. They may focus on advancing in their current workplace, or on preparing for a new career path elsewhere. After the initial self-analysis outline, the workbook prescribes formulating a professional development plan through regular journaling, with the aim of achieving specific objectives. Clearly, anyone who follows through on the guidance provided by the workbook on his or her own must be highly self-motivated.

While the concept of a PDP makes eminent sense, it has the disadvantage of demanding a considerable amount of self-discipline. Not everyone has enough motivation to carry out the procedures described in the EDUCAUSE document. An external push to do so may be needed. This could come from licence renewal requirements or from the prospect of prestige associated with board certification. For example, in fields such as the health sciences in the United States, evidence of continuing education tends to be mandated in order to retain the right to practice (Miller et al. 2008).

The more important that accountability is, the more likely it is that there are systems to ensure that practitioners maintain competence. Typically, these systems depend on documenting participation in CE, but Vaughn, Rogers, and Freeman (2006) found little evidence that continuing medical education led to improved outcomes for patients. Campbell and others (2010) envision introducing lifelong learning skills into basic medical education. This would lead physicians to choose CE depending on practice-based learning goals rather than on convenience, and would result in better patient care. Another approach was tried with dentists: receiving assistance in creating PDPs promoted better matching between learning and practice (Bullock et al. 2007).
Teaching is another profession that can be required to maintain competence. One study showed that teachers may have positive attitudes towards PDPs, but have trouble finding time to use them (Janssen, Kreijns, and Bastiaens 2013). Administrative support is recommended. On the other hand, Angeline (2014) describes the advantages of his own plan for continuing to learn and grow, despite having achieved success and satisfaction in his career. He cites a study where

The midcareer teachers interviewed noted three broad categories of change: (1) accepting responsibility for creating an individual path of professional development; (2) an increased willingness to learn from a variety of sources, including other teachers and their own students; and (3) a heightened awareness of teaching in the larger context of society (Angeline 2014, 52).

Even when PDPs are not required for governmental licensing or professional certification, they can be useful in helping professionals clarify career objectives, make good choices among CE offerings, or develop self-directed learning projects.

**PDPs as organizational tools for staff development**

Employers in fields where regulation is not an issue can still have a significant investment in staff development and therefore an interest in using PDPs (Eisele et al. 2013). Learning agendas worked out between employees and their supervisors, and administered by human resources departments, are tools that can be tied to an annual performance appraisal. Ultimately, the organization benefits when managers help “employees understand their roles in meeting group and company business goals ... explore career paths and then define...learning requirements that will help them achieve both their own career objectives and the company’s business goals” (Tobin 2000, 58). Tobin presents an outline of a “learning contract” in three parts:

**Part I: Define learning needs**
1. Understand the company’s business goals
2. Translate company goals into group and individual goals
3. Determine what you need to change to meet those goals
4. Determine what you need to learn to make those changes

**Part II: Develop a learning plan**
5. Identify learning resources to be used
6. Identify learning methods to be used
7. Develop a schedule for learning activities
8. Determine methods of measuring learning achievement

**Part III: Apply learning to work and measure results**
9. Determine how learning will be applied on the job
10. Measure effects of learning on accomplishment of individual, group, and company goals (Tobin 2000, 62)

For an example of how an organization’s needs and an individuals’ plans can be mutually beneficial, the health sciences provide a model in the nursing literature (Cooper 2009). While the personal PDP illustrated in the article is quite streamlined, it is embedded in a CE
“pathway” that breaks career progression into ten years, with specific levels of expertise that nurses in an intensive care unit should achieve by each “milestone.” The pathway also suggests appropriate learning resources for every level, but each nurse can set her/his own goals. This is an approach that avoids the one-size-fits-all CE program, while providing a great deal of guidance in identifying needed skills and resources for acquiring them.

There is evidence that traditional CE and staff development do little to create a culture of learning within organizations, and that learning plans and supportive management might be effective (Evans 1999; Janssen, Kreijns & Bastiaens 2013).

**PDPs in librarianship**

While use of the terms “personal learning plan” and “professional development plan” does not have a long history in library literature, the conceptual roots run back more than forty years. In an article published in the Journal of the American Library Association in 1967 Houle, that era’s dean of adult education, stated that the individual’s “learning efforts must be self-directed,” and noted a new proliferation of educational technology and materials that make it possible (Houle 1967, 265). In 1976, Malcolm Knowles, another adult education scholar well known to librarians, presented his model for assessing CE needs to the first Continuing Library Education Network and Exchange (CLENE) Assembly. He proposed that, in order to learn, an adult has to recognize “a gap between ‘where I am now’ and ‘where I want to be’,” which can then lead to a “plan for improvement” in the form of a learning contract (Knowles 1976, 100). By 1979, Knowles’ concepts were used to design a workshop that introduced self-assessment and learning contract techniques to that year’s CLENE Assembly attendees. The flyer condensing the content of that workshop is reproduced below as an appendix. Knowles continued to use and recommend learning contracts throughout his career, and published a book describing the theory supporting them, together with examples (Knowles 1986).

The most striking difference between Knowles’ 1976 presentation and the 1979 workshop is that the former was framed in the context of state-wide CE planning, while the latter focused on personal development, either for a current position or for one desired in the future, whether in the same or a different setting. The idea undergirding both was the same: that is, the gap between a present and a desired state of capability must be described, and a strategy for closing the distance has to be chosen and carried out. The process concludes with a judgment of the effectiveness of the project. The personal learning contract can be viewed as formalized self-directed learning or as a PDP.

In the considerable library staff development literature of the last decades, learning contracts are not prominent. Self-directed learning gained some attention (Patrick 1990; Varlejs 1996) and PDPs are beginning to appear in the library literature (e.g., Kelly & Werthmuller 2013). Sewell (2014) describes her library’s success with introducing an individualized self-directed learning program to its staff. Inspired by a webinar which has been archived (WebJunction 2013), the program is built around modified, mini-versions of learning contracts and PDPs.

One writer whose books continue to include learning contracts is Barbara Allan (2003a, b). She defines the contract as
…an agreement between two people (or more) specifying a learning process. Learning contracts are likely to contain the following information:

- Learning outcome
- Proposed activity
- Resources required
- Support required
- Assessment of learning outcomes
- Target date (Allan 2003a, 166)

While Allan tends to see learning contracts as primarily serving the interests of the organization, she does include a section on developing yourself as a learner in the work context (2003b, 24).

It is not surprising that the library literature gives little space to learning contracts and PDPs. As described above and in the appendix, the steps in the plans parallel those of instructional design. These steps are familiar to the many librarians who attend and/or deliver formal CE events, and who are used to teaching themselves the latest technology “on the fly”. In addition, they are increasingly becoming instructors of patrons in the use of library resources. Perhaps it is assumed that librarians are ipso facto expert learners and teachers. On the other hand, coaching and mentoring are prominent in the LIS literature, and may play a learning guide role that replaces formal planning. The connection between coaching and PDPs is made explicit in an article in the nursing literature (Narayanasamy & Penney 2014). On the EDUCAUSE website, the PDP workbook is a part of the mentoring section.

One library that has embraced the PDP as an organizational as well as personal tool is Yale University in the United States: see the Human Resources website on “Organizational Effectiveness & Staff Development” (Yale 2015) which includes a guide for “Individual Development Planning.” This differs from the EDUCAUSE workbook in that it is designed to be used with a supervisor:

Taking time to discuss each individual staff member’s professional needs or aspirations for growth, at least once a year, is the basis of the Individual Development Plan (IDP) process. Currently available for Managerial and Professional staff members, an IDP starts with an annual conversation between a manager and a staff member that is transformed into an action plan of realistic steps the employee can take to help them build a desired skill, better use their existing talents, or prepare for a career goal (Yale 2012).

The guide is similar to the EDUCAUSE workbook in that it calls for the employee to analyze strengths, interests and goals, but the emphasis is on aligning those with the needs of the Library. While the employee is asked to be the leader of this annual conversation with the manager, it is clear that the resulting IDP will relate to the last performance review. The option of preparing for a position in an organization other than Yale is not included. Moreover, one has to assume that the manager is the same person as the one who was responsible for the earlier performance appraisal, and may therefore have stronger ideas about what should be in the IDP than the employee.

Even though the Yale guide is unabashedly an employer’s tool, it is well worth looking at it as an example of this kind of approach to staff development, aligned with organizational development. It has interesting lists of possible learning activities that go well beyond the
usual, and includes an example of an IDP. The process leads to a customized plan that is a significant advance over the one-size-fits-all training program.

**Creating a Professional Development Plan, adapted for librarians**

The EDUCAUSE template starts with a brief admonition to make the process a priority, and to keep a journal as a means toward reflection and self-awareness. What follows here is an abbreviated adaptation that readers and 2015 CPDWL Satellite attendees can use on their own or with colleagues, as long as EDUCAUSE and CPDWL are credited.

The “Current Career Issues Worksheet” is a good place to start; it asks you to quickly check the statements that are true for you:

- You are new in your job and have not received enough orientation to fully understand how the institution works, what is expected of you, how to execute your tasks
- You have been in the job long enough to be able to do the work, but want to do it better
- You have mastered the work and see ways to do it more efficiently and/or to improve the results for users
- You want to earn a promotion
- Personnel changes have made work stressful
- The job is no longer challenging; you want to prepare for something new

What you want to change:
- Stay in the same institution, but work in a different part of the system
- Stay in my specialty, but move to a different institution
- Study for another degree or certificate
- Change careers
- Other:

The next part of the template is headed “Pinnacle/Foothill Activity.” You are asked to reflect on what about your work energizes you, and what drains you.

Pinnacle moments: Write down quick descriptions of two or three satisfying accomplishments, events, etc. What about each one was satisfying or energizing?

Foothill moments: Write down two or three unsatisfying events in your career. What made them draining?

After reflecting and very briefly writing down just enough to characterize these, team up with a partner and come up with a “headline” to summarize one pinnacle and one foothill event. The idea is that sharing these moments with someone else helps to clarify them and to suggest in what direction you want your career to go, and what you want to avoid.

The next section of the template, “Self-Assessment Worksheet,” asks you to answer a series of questions to lead you through considerations important to your career planning. The EDUCAUSE template includes lists of skills and values that can stimulate more ideas (see pages 11-12 in the online template).
1. Think about new trends, technologies, issues in your area of librarianship, and ask yourself what interests you the most? What are your strengths for pursuing these interests? What do you need to do to go in a new direction?
2. What do you most value about your work? Is it intellectual challenge? Helping people? etc.
3. What are the “must-haves” in a job? Examples might be time and financial aid for involvement in professional associations, adequate support staff, etc.
4. What are limiting factors? It might be geography, reluctance to assume a management role, lack of an advanced credential, etc.

Next is the “Action Steps Worksheet.” Once you have identified a career direction that feels right and possible, start deciding on actions that should help you to move in that direction. There is a list at the beginning of the guide which includes obvious steps such as enrolling in courses or workshops. It also suggests asking for new assignments in your current job, seeking out people with expertise in your target area, redirecting your professional reading. It should not be hard to identify associations, listservs, blogs, and other information sources that can provide background and point you to further learning resources. The EDUCAUSE guide suggests that you organize the steps you plan to take within a short to a longer term time frame.

Next comes a “Professional Development Worksheet” which poses ten questions that assume that you will remain in your current workplace, and that ask about changes that you anticipate (or that are already under way). For this part of the self-assessment you are directed to work with a mentor, coach, or supervisor, so it is not realistic to carry out at a conference. You can, however, make a start on your own and work on it with a colleague when you return home. The outcomes of this discussion should reveal the implications for your PDP, from the perspective of the needs of the organization. Anyone who has already come to the decision to seek a new position elsewhere may want to skip this worksheet, but going through the questions could actually be good preparation for a future job interview. The process could also be a way to confirm or revisit the choice to seek a position elsewhere.

The guide concludes with five “Goal Development Questions for My Journal.” Questions one to three ask what you want to accomplish and the knowledge/skills you want to acquire or improve by this time next year/end of the second year/end of the third year. The fourth question asks you to identify barriers or obstacles that might keep you from meeting the deadlines you have set. The last question is really two: What can be done to overcome the barriers, and what resources are available to help you.

Discussion: PDPs in the real world

As suggested earlier, the professional who designs and carries out the kind of analysis and follows through on the plan as outlined in the EDUCAUSE template has to be very motivated and determined. Therefore the use of PDPs will occur more likely in situations where they are tied to performance reviews (e.g., as at Yale University Library) or where they can be incorporated into mandatory CE.

Unlike health professionals, however, librarians are not always licensed, and even when that is the case, they are not necessarily required to renew the license periodically, based on CE
participation. The website of the American Library Association’s Allied Professional Association summarizes the situation in the USA. (2006). It should be noted that the term “certification” as it appears there is not necessarily used correctly. Where states regulate the conditions of practice a more accurate term is “licensure.” In the United Kingdom, the Chartered Institute for Library and Information Professionals (CILIP) oversees three levels of “professional registration:” certification, chartership, and fellowship, as described in “Certification: A guide for members” (CILIP 2014). As of 2016, “revalidation” of these designations will be mandated (CILIP 2015). Broady-Preston and Cossham (2011) state that to their knowledge the only library/information associations that have mandated CPD are CILIP in the UK and LIANZA in New Zealand, and believe that the requirement to participate in and document continuing professional development should have “… a positive impact on the profession, both in terms of the individual levels of skills and knowledge attained, and in terms of the wider understanding of the importance of professionalism gained by members of the profession, employers and the general public” (Broady-Preston & Cossham 2011, 31; 36).

Both associations ask that individuals document their CPD, with portfolios emerging as the preferred method. Starting with a PDP such as that outlined in the EDUCAUSE guide and adding to it a portfolio to record and reflect on the process seems like a natural progression. For example, in the health sciences,

… electronic portfolios have...transitioned from tools to document participation in learning activities into tools that support multiple functions including the ability to set and monitor goals, plan CPD activities, manage learning projects, access learning resources and document the outcomes of self-directed learning, self-assessment and performance assessment for practice (Gordon and Campbell 2013, 288).

It is interesting to compare the use of ePortfolios in CPD as presented in the Gordon and Campbell article with the 1979 CLENE learning contract reproduced in the appendix. The underlying concepts and principles are very much alike, but the former supports the mandatory Maintenance of Certification program of the Royal College of Physicians and Surgeons of Canada, while the latter is now more a reminder of good intentions than a tool applied in the practice of most library/information professionals. Although it is evident that many do pursue continuing learning, how to inspire greater acceptance of PDPs on a voluntary basis continues to be a challenge.

Conclusion

Perhaps the program described by Sewell (2014) holds the greatest promise of making personal professional development a regular part of the work life of library staff. It is successful because it provides for regular time away from regular duties, is supported by management but is not tied to performance reviews, and provides for sharing and feedback. It gives individuals a great deal of autonomy to choose what to learn and what resources to use, but also ensures regular communication with supervisors and help when it is needed.

A more highly structured, top-down approach is represented by the National Library Board of Singapore. A complex organization of 25 public libraries and various departments, it nevertheless tries to include self-directed learning in its mix of opportunities: “In all, this paper talks about various measures that NLB has in place in support of learning: Core
Learning Infrastructure; Formal, Quasi-formal and Informal Platforms for Learning; and Beyond-the-position Learning” (Yeo, Muthu & Kailani 2013).

While PDPs may not be formalized, records of learning must be kept and are reviewed; hence motivation is not a major problem. Sewell’s program and that of the NLB are very different in scope, but are alike in their administrations’ commitment to staff development and to the building of a strong learning culture. Both value career success for their employees, and believe that library users will be the ultimate beneficiaries.

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LEARNING CONTRACT

In order to help me work towards these goals, I need to learn:

1. Professional goals:
   - Develop leadership skills
   - Improve time management

2. Process goals:
   - Engage actively in discussions
   - Participate in group projects

3. Skills goals:
   - Enhance critical thinking
   - Expand knowledge base

4. Attitude goals:
   - Be open to new ideas
   - Maintain a positive attitude

5. Self-assessment and personal goals:
   - Reflect on progress
   - Set realistic goals

LEARNING PLAN

Phase 1: Planning
- Research:
  - Identify key concepts
  - Review course materials

Phase 2: Execution
- Activities:
  - Attend lectures
  - Participate in discussions

Phase 3: Evaluation
- Assessment:
  - Self-assessment
  - Peer evaluation

Monitoring:
- Regular check-ins
- Adjustments as needed

Integration:
- Apply concepts in real-world scenarios
- Reflect on learning outcomes
The Critical Importance of Practice

As a teacher, I believe that the most important aspect of learning is practice. This is true for all students, regardless of their grade level or subject. Practice is not just about memorization, but about understanding and applying concepts in new and different situations. This is why I have included a section on practice in this course.

The Importance of Practice

1. Practice helps students to remember information.
2. Practice helps students to apply concepts in new situations.
3. Practice helps students to develop problem-solving skills.
4. Practice helps students to develop critical thinking skills.
5. Practice helps students to develop self-discipline.

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