

Taking Charge of your LIS Career: Personal Strategies, Institutional Programs, Strong Libraries  
12 -14 August 2015  
Cape Town, South Africa

## **Shape your career - design your professional development plan: rationale and workshop template**

**Jana Varlejs**

Rutgers -The State University of New Jersey, New Brunswick, NJ, USA  
varlejs@rutgers.edu



Copyright © 2016 by **Jana Varlejs**. This work is made available under the terms of the Creative Commons Attribution 4.0 International License: <http://creativecommons.org/licenses/by/4.0>

---

### **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.

## References

- Allan, Barbara *Developing staff through work-based learning*. Revised and adapted by Barbara Moran. 2003a. Lanham, MD: Scarecrow Press.
- , *Training skills for library staff*. Revised and adapted by Barbara Moran. 2003b. Lanham, MD: Scarecrow Press.
- American Library Association-Allied Professional Association. 2006. *State/regional certifications (primarily for public library staff)*. <http://ala-apa.org/certification-news/stateregional-certifications/>
- Angeline, Vincent R. 2014. [Motivation, professional development, and the experienced music teacher](#). *Music Educators Journal* 101 (1): 50-55.
- Broady-Preston, Judith and Amanda Cossham. 2011. Keeping the information profession up to date: Are compulsory schemes the answer? *IFLA Journal* 37 (1): 28-38.
- Bullock, Alison, Vickie Firmstone, John Frame, and Julie Bedward. 2007. [Enhancing the benefit of continuing professional development: a randomized controlled study of personal development plans for dentists](#). *Learning in Health & Social Care* 6 (1): 14-26.
- Campbell, Craig, Ivan Silver, Jonathan Sherbino, Olle Cate, and Eric S. Holmboe. 2010. Competency-based continuing professional development. *Medical Teacher* 32 (8): 657-662.
- Chartered Institute for Library and Information Professionals (CILIP) 2014. *Certification: A guide for members*. <http://www.cilip.org.uk/sites/default/files/documents/Certification%20Handbook%20FINAL.pdf>
- Chartered Institute for Library and Information Professionals (CILIP) 2015. *Obligatory revalidation*. <http://www.cilip.org.uk/cilip/jobs-careers/professional-registration/obligatory-revalidation>

- Cooper, E. 2009. Creating a culture of professional development: A milestone pathway tool for registered nurses. *The Journal of Continuing Education in Nursing*, 40 (11): 501-508.
- EDUCAUSE. n.d. Creating a professional development plan. [https://net.educause.edu/section\\_params/mentoring/M06\\_%20PDP.pdf](https://net.educause.edu/section_params/mentoring/M06_%20PDP.pdf)
- Eisele, Lisa, Therese Grohnert, Simon Beusaert, and Mien Segers. 2013. Employee motivation for personal development plan effectiveness. *European Journal of Training and Development* 37 (6): 527-543.
- Evans, Val. 1999. A framework for self-directed professional development: A research Report. [Project commissioned by the Professional Development Network, Training and Development Directorate, New South Wales Department of Education and Training] <http://www.voced.edu.au/content/ngv37218>
- Gordon, Jennifer A. and Craig M. Campbell. 2013. The role of ePortfolios in supporting continuing professional development in practice. *Medical Teacher* 35 (4): 287-294.
- Houle, Cyril O. 1967. The role of continuing education in current professional development. *ALA Bulletin* 61 (3): 259-267.
- Janssen, Sandra, Karel Kreijns, Theo J. Bastiaens. 2013. [Teachers' beliefs about using a professional development plan](#). *International Journal of Training and Development* 17 (4): 260-278
- Kelly, Charlie and Kelly Werthmuller. 2013. [Take charge of your professional development!](#) *Knowledge Quest*. 42 (1): 76-77.
- Knowles, Malcolm. 1976. Model for assessing continuing education needs for a profession. In *Proceedings: First CLENE assembly*, 82-102. Washington, DC: CLENE.
- Knowles, Malcolm S. 1986. Using learning contracts: Practical approaches to individualizing and structuring learning. San Francisco: Jossey-Bass.
- Markgren, Susan. 2014. Managing your career: Start planning, creating, and sharing. <http://metro.org/articles/managing-your-career-start-planning-creating-and-sharing/>
- Miller, Stephen H., James N. Thompson, Paul E. Mazmanian, Alejandro Aparicio, David A. Davis, Bruce E. Spivey, and Norman B. Kahn, Jr. 2008. Continuing medical education, professional development, and requirements for medical licensure: A white paper on the Conjoint Committee on Continuing Medical Education. *Journal of Continuing Education in the Health Professions* 28 (2): 95-98.
- Narayanasamy, Aru and Penney, Vivian. 2014. [Coaching to promote professional development in nursing practice](#). *British Journal of Nursing* 23 (11): 568-573.

- Patrick, Ruth J. 1990. [Self-directed learning for the reference librarian](#). *Reference Librarian* 13 (30): 207-224 .
- Sewell, Sarah. A self-directed approach to staff professional development. 2014. *Arkansas Libraries* 71 (4): 4-5.
- Tobin, Daniel. R. 2000. *All Learning is self-directed: How organizations can support and encourage independent learning*. Alexandria, VA: American Society for Training and Development.
- Varlejs, Jana. 1999. On their own: Librarians' self-directed, work-related learning. *Library Quarterly* 69 (2): 173-201.
- Vaughn, H. Todd, Janet L. Rogers, and Julie K. Freeman. 2006. Does requiring Continuing Education Units for professional licensing renewal assure quality patient care? *The Health Care Manager* 25 (1): 78-84
- WebJunction. 2013. *Self-directed achievement: If you give library staff an hour*.  
[http://www.webjunction.org/events/webjunction/Self\\_Directed\\_Achievement.html](http://www.webjunction.org/events/webjunction/Self_Directed_Achievement.html)
- Yale University, Human Resources. 2015. *Organizational Effectiveness & Staff Development*  
<http://www.yale.edu/hronline/oesd/>
- Yale University, Human Resources. 2012. *Individual development planning: Achieving higher performance, guide to getting started*.  
<http://www.yale.edu/hronline/idp/docs/IDP-Guide-to-Getting-Started.pdf>
- Yeo, Z. B., V. P. Muthu, and I. Kailani. 2013. *A corporate climate for learning: practices from National Library Board, Singapore*. Paper presented at: [IFLA WLIC 2013 - Singapore - Future Libraries: Infinite Possibilities](#) in Session 100 - Continuing Professional Development and Workplace Learning with Education and Training.  
<http://library.ifla.org/112/>

CLENE: THE CONTINUING LIBRARY EDUCATION NETWORK AND EXCHANGE  
SELF-ASSESSMENT AND THE LEARNING CONTRACT:  
A SYSTEMATIC AND PERSONAL APPROACH TO LEARNING

This flyer has been prepared by CLENE members to give you a capsule version of two continuing education techniques which are becoming more popular with individuals in pursuit of their own learning. Since the primary focus of continuing education is the individual, self-assessment and the use of a personal learning contract are natural developments which we can expect to see more widely used. Self-assessment had a role in the 1978-79 CLENE statewide continuing education institute and it was also the topic of our 1979 Assembly workshop at Dallas. We encourage you to use these techniques in planning your own continuing education program and to share the concepts with colleagues and friends at home.

Instructions:  
 The purposes of self-assessment and learning contracts are to better identify our learning needs in the context of personal life and work experience; to establish realistic learning objectives to meet these needs; to identify the ways in which we can best learn according to our own learning style and environment; and, to establish the ways in which we will know how well we are meeting our learning objectives.

Your first step in this personalized approach to learning will be to find a good thinking place where you can spend some quality time with yourself. Consider your interests, specific educational needs (work or life related), and the personal and professional goals which you would like to prepare yourself for. Your interests and needs are considered separately because what you want to learn may not necessarily coincide with what you need to learn. A list of sample questions is provided here which will help you focus on these needs and wants in order to set priorities for your learning program. Throughout this flyer we have economized on space to give you the whole model, but in a shortened form. You will want to make your own question sheets and forms.

Self-Assessment Questions:

1. Interests
  - a. Of my own personal interests, the following are most important to me:
  - b. My professional interests tend to focus on the following areas:
2. Needs
  - a. The skills or areas of knowledge which I most need to do a good job in my present work situation are (administration, research, storytelling techniques, computer technology, etc.):
  - b. Among my list in 2a, I know the least about and should learn more about the following:
3. Goals for Professional Growth
  - a. Right now, my overall professional goals are:
  - b. In order to help me work towards these goals, I need to learn:

4. Goals for Personal Growth (which may well affect professional goals too)

- a. My personal strengths and assets are (physical, mental, interpersonal communication skills, etc.):
5. Summary of Assessment
- Looking over the lists I have made, I would like to spend next year or so improving and growing in the following areas (one suggestion is to choose those of greatest priority and at least one from each of the four areas):

While self-assessment is a very personal process, no one assumes that you won't need some help in identifying your own learning needs. Talk with someone who might have the experience or knowledge to help you identify what you should consider in this process. Let's assume you have decided it is time in your career to plan for becoming President of the American Library Association. You discuss this with past presidents, individuals who also ran, members of ALA council, Executive Board and staff of ALA. You may even want to talk with people who have been in this position in other associations. With this guidance, you can then rough out a way to isolate the needs you will base your learning program on.

My overall goals	Skills to meet goals	My skills	What I need
President of ALA	Political Leadership	Small group communication	Public speaking

Once you are satisfied that you have identified the learning needs which you should begin to address, it is time to develop a learning contract which will help you move towards the realization of your learning goals. The elements of this next step are listed with a framework to use in setting up your learning program.

Personal Learning Contract

Now that you have a starting place to build your learning program from, it is time to identify specific objectives and design a learning contract with yourself. You may well need help in doing this process as you did in identifying learning needs, and there are many places for this kind of help. If there isn't a librarian type to help you, you may get some assistance from a local Community-Based Educational Counseling for Adults (CBECA) program or its equivalent. Again, the brevity of this flyer allows us only to give you the general areas for consideration in the contract and a sample of what forms you may want to use.

LEARNING CONTRACT

Learning Objectives "What Am I Going To Learn?"	Learning Resources & Strategies "How Will I Learn It?"	Evidence of Accomplishment of Objectives "How Will I Know I Learned It?"	Criteria & Means for Validating Evidence "How Will I Prove I Learned It?"

1. What Am I going to Learn--Specific Learning Objectives

Translate each of the Learning needs you assessed in item 5 above into a Learning objective and place this in column 1 of the Contract illustrated. Objectives should describe what is to be learned, not what is to be done. State your Learning objectives in terms that are most meaningful to you--content acquisition, behaviors, or directions of growth. Remember to use action verbs and to be as clear as possible.

2. How Will I Learn It--Specify Learning Resources and Strategies

In column two of the contract, describe proposed ways in which you can best meet each objective. Identify the resources (material and human) and list the strategies (techniques and tools) to be employed in making use of them. Write down as many possibilities as you can. Several types of Learning activities are suggested in this flyer to give you an idea of the many possibilities to choose from.

3. How I Will Know I Learned It--Specify Evidence of Accomplishment

In the third column, "Evidence of Accomplishment of Objectives," describe the evidence you will collect to indicate the degree to which each objective has been achieved. Use measure which makes the most sense to you.

4. How Will I Prove I Learned It--Specify How the Evidence Will Be Validated

5. Review Contract With Consultants

To strengthen the quality of the contract, review it with one or two friends, supervisors, or other expert resource persons and get reactions and suggestions.

6. Carry Out The Contract

As you work on carrying out the contract, notions about what is to be learned may be changed. If this is the case, revise the contract accordingly.

7. Evaluation of Learning

One of the simplest ways to get some assurance that learning objectives have been achieved is to ask the consultants used in Step 5 to examine the evidence and validation data and give their judgment on your accomplishments.

You may want to set time limits for yourself to achieve each objective, depending on a realistic assessment of time available and your motivation.

As you proceed with your plans, keep a log of time spent and what you did. This log can be used in assigning continuing education credit. You may find it helpful to record your learning activity and your accomplishments even if you are not interested in credit. This kind of information provides additional guidance to your learning program.

RECORD OF LEARNING ACTIVITY

Inclusive Dates of Attendance	Provider (If Applicable)	Description of Learning Activity	No. of Hours

Types of Learning Activities To Consider in Meeting Your Learning Objectives\*

- Educational activities which are part of a planned program, sponsored by a "responsible" provider (workshop, academic courses taken for credit or by audit, independent study, seminars, institutes, short courses, etc.)
- Special activities not part of a planned program--(journal clubs, study groups, association meetings with specific educational objectives, lecture series, etc.)
- Non-supervised individual activities--(personal use of any A/V devices such as audio and video tapes, film-strips, films; programmed materials; individual reading projects).
- Papers, publications, books, presentations and exhibits--(self-explanatory but quality control criteria will specify how to assess this category activity).
- Teaching assignments.
- Other meritorious learning activity--(activities not covered in the previous categories but meet criteria for quality and show evidence of why it was chosen, how it was planned, how it was carried out and how it was evaluated as well as indication of any supervision).
- Association activities (projects, papers, educational programming).

\*CLENES work on a national voluntary recognition system for your continuing education accomplishments will add to this list, clarify each activity, provide a general measurement concept for the activities and establish quality control criteria for evaluating activities as well as programs. To learn more about this Project, contact CLENE for the full report or Concept Paper #6, "Recognition For Your Continuing Education Accomplishment."

If you want to learn more about the techniques of self-assessment and planning your own learning contract, the best place to look is a small book by Malcolm Knowles, Self-Directed Learning: A Guide for Learners and Teachers.

**CLENE**  
 CONTINUING LIBRARY  
 EDUCATION NETWORK  
 AND EXCHANGE

The Catholic University of America  
 620 Michigan Avenue, N.E.  
 Washington, D.C. 20064  
 (202) 635-5085