

# **COMPETENCY-BASED CAREER PLANNING** FOR REFERENCE AND USER SERVICES PROFESSIONALS

JO BELL WHITLATCH

BETH S. WOODARD

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## foreword

**OVER TWENTY YEARS AGO I HAD THE** good fortune to be hired and trained by Beth Woodard as a reference services graduate assistant at the University of Illinois. She prepared her new charges as thoroughly as a week of training would allow before placing us at the busy information desk to answer questions during the transition to a new library catalog and our first set of web-based article databases. We weren't left to sink or swim because Beth had also carefully planned out weekly meetings with training topics and included career development as an integral part of our training.

A few years later Beth moved into a library-wide role as a training coordinator, and I stepped into her role of training the reference graduate assistants. I started with the excellent training framework that Beth had designed over the years and then modified it. During my time at Illinois I trained over seventy graduate assistants for the main reference department and led further training for hundreds more across the campus libraries. Beth has been thinking about and training librarians in professional competencies for decades, and I owe most of what I know about training and career planning to her tutelage.

Jo Bell Whitlatch also had a foundational impact on my career, even though we have only met a few times in person. Her book *Evaluating Reference Services* made its way from our reference department shelves to a semipermanent home in my office and was a guiding light as I developed both training for and the assessment of reference services at the University of Illinois. Her research was pivotal to my research by providing both insight and inspiration.

The influence of Beth and Jo Bell exemplify the impact that both mentors and researchers can have

on the career development of librarians. I feel lucky in having found so much guidance at an early stage in my career. Librarians' individual experiences vary greatly both within the master's degree program and afterward, and this is where *Competency-Based Career Planning for Reference and User Services Professionals* has a vital role in providing a framework and useful exercises for career planning in public services librarianship across all types of libraries.

Whatever we think we know going into our training, or our first job in libraries, or our second or fifth job in libraries, there is always more to know, and another level of expertise to reach or another skill to develop. There are myriad "What I didn't learn in library school" articles and blog posts, but a career is always a lifelong learning process, and much is learned on the job or otherwise outside of the classroom.

Being a public services librarian is broader than I imagined when I was studying for my MLIS degree. Marketing and assessment were not subjects that I thought much about as I trained for my future career, but in my very first job I found myself promoting a grant-funded project to the upper administration and marketing our project's services to library faculty. Another of the grant's requirements was to perform an assessment of the project's impact. Careers can develop in both planned and unexpected ways, even for the same person. My job nearly twenty years later contains even more marketing and assessment. I've had to master planning a wider range of public services beyond reference service. I have worked at different types of libraries with diverse patrons representing a range of cultural and academic backgrounds. The competencies in this book have applied to all of my positions, albeit as varying proportions of my day.

The RUSA "Professional Competencies for Reference and User Services Professionals" encapsulate the range of skills and expertise that are required of a public services librarian. In this book, Whitlatch and Woodard combine their research acumen and experience to deliver a practical, well-grounded set of tools that expand on the RUSA "Professional

Competencies" and can help you develop your own career plan. My favorite aspects of this book are the many tools for self-assessment. Reflective practice enables us to learn from our own experiences—both those we assess as "good" and those we experience as "bad"—in order to continually improve. Structured self-assessment such as the checklists in chapter 2 situates our self-reflection within agreed-upon best practices, and moves us beyond feelings of inadequacy or success by facilitating more nuanced assessment and guided follow-up.

If this book had been written when I was training graduate students at Illinois, it would have been a cornerstone for designing their training, and a recommended book for them to use after graduation. Often supervisors plan training that is very specific to their libraries, but this training may either assume particular existing competencies or does not connect to a broader set of skills that will serve the employee in future jobs. When approached this way, the work can feel more like a set of tasks and less like a career. I know that at times my own approach was focused on immediate mastery of a tool or local policy, and for the training to be most effective I would need to "back up" to the underlying principles. The RUSA "Professional Competencies" connect us to the profession of librarianship and help create a trajectory for lifelong learning, which is what we should want for everyone working in our libraries. *Competency-Based Career Planning* also has value for managers and supervisors in developing position descriptions, training plans, and in promoting professional development for their staff at all levels.

This book will provide a foundation and inspiration for your own career as a reference librarian. It is a work to take with you throughout your career and use not just as a new librarian but as a mid-career librarian, a manager, and to recommend to librarians that you mentor.

M. KATHLEEN KERN  
 Director, Miller Learning Center  
 University of Georgia Libraries

## **introduction**

# Introducing the RUSA “Professional Competencies”

**THE WORLD OF INFORMATION IS CHANG-**ing rapidly. The challenges in accessing, organizing, and managing today’s rapidly evolving information formats are growing every day. In reference services, the rapidly changing information environment challenges new, mid-career, and senior librarians. How can reference librarians keep their professional knowledge and skills on the cutting edge in our global information society?

Reference librarians need to be in charge of their own careers. Employers, educational programs, and professional associations can help with this, but the bottom line is that reference librarians need to be proactive when it comes to their own professional development. A good place to start is with the ideas outlined in this book. By using the practical suggestions in this book for updating and assessing their skills and knowledge, librarians will be able to reflect on their strengths and develop strategies to enhance their abilities, thereby leading to a more satisfying and enjoyable career.

The primary goal of this book is to introduce a document developed by the Reference and User Services Association (RUSA), which is a division of the American Library Association (ALA). This document is called “Professional Competencies for Reference and User Services Librarians” (hereafter the RUSA “Professional Competencies”) and was published in 2017. (See the Appendix at the end of this book for the full document.) This document is a model statement of the competencies that are essential for successful reference and user services librarians. The statement builds upon the ALA’s “Core Competencies of Librarianship” and specifically on section 5, “Reference and User Services.” In this book, we

examine the RUSA document's practical potential for librarians to enhance their skills, achieve more successful individual performance, and explore their development opportunities. Reference and user services librarians are those who assist, advise, and instruct users in accessing all forms of recorded knowledge through both direct and indirect service to patrons. In this book, librarians will learn how to use the RUSA "Professional Competencies" to assess their professional skills and abilities, create and implement individual plans for professional development, and assess their progress in enhancing their professional skills and abilities. The RUSA "Professional Competencies" are grouped into seven categories that encompass key areas for reference and user services librarians. These categories are access, sources, collaboration, information literacy, marketing and advocacy, assessment, and planning for the future.

Each category has a separate section in the RUSA "Professional Competencies" document, and the section's title is phrased in terms of a broad behavioral competency. For example, the title of section 5A is "Accesses Relevant and Accurate Recorded Knowledge and Information." Each section then has one or more subheads that cover more specific behavioral competencies; in section 5A the subheads are "Offers Services Responsive to Individual Expressed User Needs" and "Organizes and Designs Services to Meet the Needs of the Primary Community."

The organization of the seven main chapters in this book follows this same scheme. In chapter 1, "Access," which covers the competencies enumerated in section 5A of the RUSA document, there are two main subheads: "Offers Services Responsive to Individual Expressed User Needs" and "Organizes and Designs Services to Meet the Needs of the Primary Community." Each of these main sections has three subsections whose titles are characterized by the phrases "Competencies for," "Development Methods for," and "Assessing Development Efforts for." These sections respectively treat the competencies, development methods, and assessment methods for a specific competency. The "Development

Methods for" subsection discusses strategies for enhancing the librarian's competencies, and the "Assessing Development Efforts for" subsection describes methods for determining the effectiveness of the librarian's individual development efforts.

The sections below will briefly outline the importance of the seven categories of the RUSA document.

## A. ACCESS

A key value of the librarian profession is providing access, which is connecting users with appropriate information. We connect people with information and knowledge by guiding them in selecting the information that best meets their individual needs. The primary focus of this category is on understanding the information needs and information behavior of primary users and developing the skills to effectively meet those information needs. Access includes organizing and designing services that recognize the importance of user time and convenience, remove barriers to service, and assist users in coping with user information overload.

## B. SOURCES

The evaluation, selection, retrieval, and presentation of information sources for the benefit of our user communities continue to be an important function of reference. We identify and present highly recommended, carefully evaluated, diverse sources in many formats. We promote the use of these sources by creating a wide variety of guides and instructional materials.

## C. COLLABORATION

Collaboration competencies focus on building partnerships and promoting teamwork. Although librarians have always worked together, collaboration has assumed new importance in a world that has witnessed phenomenal growth in information, new knowledge, and sophisticated technology, all within a relatively short time frame. Because of the expansion of information and the increasing variety

of ways to access it, librarians must work in partnership with users, colleagues, professional organizations, agencies, and other groups to ensure that users receive the information service they need at the time of need and in the most suitable format. Librarians must actively pursue collaborations that enhance services for their users. Also, librarians need to recognize and respect the role played by the user in the information interaction.

#### **D. INFORMATION LITERACY**

For librarians and library users, the basic skill sets for finding, evaluating, and using information in all formats are critical for successful reference and user services. Successful service requires understanding and integrating information literacy concepts across the full range of services; engaging individuals through effective presentation and communication strategies; and creating a learner-centered environment.

#### **E. MARKETING AND ADVOCACY**

Marketing is much more than publicizing the library's services. It involves systematic planning, and implementing and controlling the different services that are intended to bring together users and library services and resources. Marketing involves understanding why, how, when, and from whom users obtain the types of educational and recreational information that libraries typically supply. A planning process is essential in order to identify and promote these services to users. Promoting the value of library services requires understanding and applying marketing theory and practices; developing, implementing, and evaluating an ongoing marketing plan; and promoting the value of libraries by educating our communities about the essential role that libraries play in society.

#### **F. ASSESSMENT**

Evaluation and assessment are also very important values for the survival of the library profession,

since they assist in creating and refining professional practice and in developing new, innovative services. Evaluation and assessment programs should ask not only how good the service is, but also whether the service provided is the right one.

#### **G. PLANNING FOR THE FUTURE**

Core knowledge is acquired as part of basic professional education. However, that knowledge must be continuously updated. Lifetime learning, as manifested in the practice of remaining current in the domains of knowledge for reference and user services, is crucial for the development of future services. Planning, implementing, evaluating, and enhancing innovative services and resources are also essential.

#### **WHAT ARE COMPETENCIES?**

A competency is a combination of “knowledge, skills, abilities, and behaviors that are required for job success in most professional organizations” (Association for Talent Development, 2014). So a “competency” is a skill, knowledge, ability, or behavior that is used on the job. Core or foundational competencies are the distinctive competencies that are important to the organization. They are behaviors that excellent performers exhibit more consistently and effectively than average performers. The effective assessment of competencies depends on observed behavior.

Because they relate to performing specific tasks, competencies depend on context. In this book, our context expands beyond an individual institution or work organization. The context is the collective group of reference and user services professionals. The RUSA “Professional Competencies” focus on the unique set of skills and knowledge that is required to effectively negotiate two complex systems—the ever-expanding world of information resources and the information-seeking needs of a wide variety of user groups.

Concerns about changing technology, global competition, and the quality of the workforce have



led to the discussion and development of competencies in many professions in the last two decades. Rapidly changing technology and increased global competition require a more flexible workforce and a greater emphasis on individuals taking responsibility for their own continual learning and self-development. The discussion and development of competencies for reference and user services librarians has occurred within this broader societal context. Initially reference competencies were often described in vague terms, such as “conduct a good reference interview” or “provide excellent reference service.” But such statements provide no basis from which we can create learning programs and measure our success in obtaining or enhancing competencies. Therefore, these are not effective competencies statements.

## **BEHAVIORALLY BASED STATEMENTS**

Competency statements must be easy to measure or interpret. Specific competency statements, defined in behavioral terms whenever possible, facilitate the creation of, and assessment of, professional development plans. Behaviors can be observed, described, and verified. Librarians will find that a behavioral or performance-based perspective makes working with competencies more meaningful. To assess your learning, you should evaluate how well you are able to apply the competencies—the skills, knowledge, and abilities—to specific tasks, and also evaluate your success in performing those tasks. To determine whether a competency statement is behaviorally based, ask yourself: Can you observe the individual performing a certain task and determine whether the required skills, knowledge, or abilities are at a level that results in successful performance of the task?

## **COMPETENCIES AS STANDARDS**

Competency statements can be viewed as specific standards that support the values, mission, and goals

of a library, information service, or professional organization. For example, the mission of the ALA is to provide leadership for the development, promotion, and improvement of library and information services and the profession of librarianship in order to enhance learning and ensure access to information for all (American Library Association, 2008b).

As part of its mission, the strategic plan of the ALA highlights advocacy as a strategy to provide “a vision of innovation, focus on the impact of libraries and librarians, enable the future of libraries, and promote libraries as centers of community engagement, lifelong discovery and learning” (American Library Association, 2008a).

In support of the ALA’s mission and advocacy strategies, the broad, general goals of individual libraries or information service organizations might be to “conduct a good reference interview” or “provide excellent reference service.” Competency statements can be developed from goals that set specific behavioral standards on how to achieve these general goals, which support the mission of organizations.

## **WHY SHOULD WE CARE ABOUT COMPETENCIES?**

Establishing and maintaining distinctive professional competencies are essential for the survival of all professions, including that of library and information science. Developing and maintaining distinctive competencies are one of the hallmarks of a profession. Therefore, clearly defined and distinctive competencies form the core definition of a professional. The right of professionals to determine how their work will be accomplished is generally accepted by society because of the professional expertise (the distinctive competencies) and the commitment of professionals to regulate themselves through professional associations, which set general performance standards for professional practice, establish codes of ethics, and so on. Max Weber regarded professions as a model of collegiate authority in which leaders are the first among equals (Scott, 2014).

## LEADERSHIP

We need to develop leaders at all levels of library and information organizations. In the library profession in recent years, more emphasis has been placed on leadership through activities such as outreach and partnering with organizations in the community. Today librarians continue to move away from focusing mainly on internal library operations and instead emphasizing collaborative partnerships with client groups beyond the library organization. *Summer Matters*, a book about the partnership between the Chicago Public Library and the Museum of Science and Industry (McChesney and Wunar, 2017), notes the importance of professional development in their collaborative project. In the public library, professional development allows librarians to grow their skills and practice in order to create the best outcomes for those they serve. Professional development opportunities also ensure that staff are able to respond to their users in the most effective way.

Leadership is an important professional competency. The report “Museums, Libraries and 21st Century Skills” (Institute of Museum and Library Services, n.d.) includes a section on “Leadership and Responsibility.”

Library administrators and staff still frequently view leadership only as a managerial role. However, management and leadership are related, but distinct, concepts (Phillips, 2014). A leader is “the person who leads or commands a group, organization, or country: the leader of a protest group | a natural leader” (Heery and Noon, 2017). In contrast, a manager is “a person responsible for controlling or administering an organization or group of staff” (*Oxford Dictionary of English*, 2010). However, frequently leaders are not managers who command a group. Leadership is placed in the “Administration and Management” section of the ALA “Core Competences of Librarianship” (American Library Association, 2009) rather than in the “Foundations” section. The addition of “leadership” to the ALA “Core Competences” was a last-minute amendment at the 2009 ALA Council meeting (Hicks and Given, 2013). In addition to acknowledging the importance

of leadership for managers, acknowledging leadership as a foundational competency in the ALA “Core Competencies” would better serve all future library professionals. Thus, “Museums, Libraries and 21st Century Skills” lists leadership as one of the skills that all citizens should have. Leadership skills do not include the managerial skills required to

### 21ST CENTURY SKILLS Selected Definitions—Life and Career Skills

#### Leadership and Responsibility

##### GUIDE AND LEAD OTHERS

- Use interpersonal and problem-solving skills to influence and guide others toward a goal.
- Leverage the strengths of others to accomplish a common goal.
- Inspire others to reach their very best via example and selflessness.
- Demonstrate integrity and ethical behavior in using influence and power.

##### BE RESPONSIBLE TO OTHERS

- Act responsibly with the interests of the larger community in mind.

#### Initiative and Self-Direction

##### BE SELF-DIRECTED LEARNERS

- Go beyond basic mastery of skills and/or curriculum to explore and expand one’s own learning and opportunities in order to gain expertise.
- Demonstrate initiative to advance skill levels towards a professional level.
- Demonstrate commitment to learning as a lifelong process.
- Reflect critically on past experiences in order to inform future progress.

SOURCE: Institute of Museum and Library Services. n.d. “Definitions,” in “Museums, Libraries and 21st Century Skills.” <https://www.ims.gov/issues/national-initiatives/museums-libraries-and-21st-century-skills/definitions>.

administer or control a group. Thus, as a professional and citizen, every librarian should develop the 21st-century leadership skills as a core competency.

## LIFELONG LEARNING

Maintaining distinctive professional competencies requires taking responsibility for lifelong learning. Libraries, as employers, do need to provide more funding for specific job-related skills that will assist librarians in maintaining and enhancing their distinctive professional competencies. Today, however, professional growth and development is primarily a personal responsibility. “Museums, Libraries,

and 21st Century Skills” includes under the “Life and Career Skills” heading being a self-directed learner. Self-development, with the individual taking primary responsibility for choosing what, when, where, and how to learn, is likely to be the most important skill set of the future for all librarians. How much responsibility do you take for your own learning and development? Use the competencies in figure 0.1 to assess the extent to which you practice these self-development competencies.

Specific, distinctive competency statements provide benefits for individual professionals, an individual library or information service organization, and the profession as a whole. When competencies are clear, individuals know what it takes to succeed.

Competency	Self-Assessment
Maintaining an active interest in self-development and responsibility for furthering one’s own learning	Identifies areas for development annually and taking identified best methods ___ Yes ___ No
Defining and updating career goals	Updates written career goals annually ___ Yes ___ No
Evaluating one’s own strengths and weaknesses	Uses organizational or professional competency statements to assess ___ Once a year ___ Less often ___ Never
Modifying behavior based on feedback from others on one’s performance and the self-analysis of one’s experience	Seeks feedback on performance ___ Frequently ___ Occasionally ___ Seldom
Continually seeking opportunities for learning and training	Prepares analysis of professional development annually and shares with manager. Solicits feedback. ___ Yes ___ No
	Scans environment for development opportunities on the job and through formal and informal education ___ Continuously ___ Occasionally ___ Seldom
<p>_____</p> <p>SOURCE: Competency statements are from J. Bryant and K. Poustie. 2001. <i>Competencies Needed by Public Library Staff</i>. Gutersloh: Bertelsmann Foundation, p. v.</p>	

**FIGURE 0.1** • *Managing One’s Own Learning*

This in turn leads to greater career satisfaction, both in terms of the intrinsic rewards of doing a job well and of recognition by others. Organizations will also benefit through the enhanced quality of products and services.

## **BENEFITS OF COMPETENCIES FOR INDIVIDUALS**

For individual professionals, the major benefits of developing distinctive competencies are:

1. Identifying gaps in their skills, abilities, and knowledge
2. Creating professional development plans to enhance their professional skills, abilities, and knowledge
3. Seeking organizational and professional support for well-defined and focused development plans
4. Identifying job assignments that will enhance their professional skills, abilities, and knowledge
5. Enhancing their job success, quality of performance, and job satisfaction
6. Developing distinctive expertise and being recognized by others for their unique expertise within the organization or the profession as a whole
7. Assisting in preparing for job advancement and promotion within the organization or the profession as a whole

## **BENEFITS OF COMPETENCIES FOR ORGANIZATIONS AND THE PROFESSION**

For the organization and the profession, the major benefits of developing distinctive competencies are:

1. Reinforcing and enhancing a shared understanding of the work
2. Establishing uniform performance expectations
3. Ensuring consistency of performance across all professionals

4. Identifying needed areas for staff development and training
5. Assisting in counseling or coaching individuals for improved performance
6. Assisting in recruiting the best-qualified people
7. Providing public statements about what competencies the public can reasonably expect
8. Identifying common gaps in the skills of organizational/professional members
9. Assisting in establishing common goals and understandings
10. Providing a better fit between people and their task requirements
11. Establishing guidelines for organizational success

## **THE RUSA “PROFESSIONAL COMPETENCIES” AND PROFESSIONAL DEVELOPMENT PLANS**

The RUSA “Professional Competencies” define the knowledge, skills, and abilities for librarians who perform reference and user services roles. Although the RUSA “Professional Competencies” provide general guidelines for development, librarians should also create an individual development plan that focuses on development priorities.

### **Association for Talent Development (ATD) Competency Development Model**

A professional development plan that is especially relevant to developing and enhancing competencies is the Association for Talent Development’s (ATD) new plan for training and development competencies. Of most value is the ATD Competency Model’s Job Aid: Action Planning for Individuals (Association for Talent Development, 2014), so that you can identify strengths and weaknesses in your existing competencies. This ATD job aid also provides an outline of the main steps: (1) reviewing the foundational competencies and rating their importance for you; (2) listing your priorities for development

of the various competencies; (3) reviewing the areas of expertise and selecting those that are most important to you; and (4) listing your priorities for development in foundational competencies and areas of expertise.

In applying the ATD Competency Model, you should use the RUSA “Professional Competencies” to serve as your focus for areas of expertise, rather than the ATD training and development competencies. For training and development professionals when considering foundational competencies, the ATD model lists business skills, global mindset, industry knowledge, interpersonal skills, personal skills, and technology literacy. Certainly, many of these foundational skills would be relevant to all librarians.

## Action Plans

Another useful tool is the action plan. In this approach, a participant defines appropriate outcomes and the steps to achieving them as a result of the training program. Obstacles are anticipated as well. Viewed as a self-motivational tool, the action plan helps keep the person on track for implementing changes.

Janet Shapiro (n.d.) in her “Action Planning Toolkit” notes that most action plans consist of the following elements:

- a statement of what must be achieved (the outputs or result areas that come out of the strategic planning process)
- spelling out of the steps that have to be followed to reach this objective
- some kind of schedule for when each step must take place and how long it is likely to take (when)
- clarification of who will be responsible for making sure that each step is successfully completed (who)
- clarification of the inputs/resources that are needed

The title of Catherine Hakala-Ausperk’s (2010) article “Invest in Yourself!” summarizes the main theme of this introduction very concisely. Although her article is primarily aimed at developing managers, we would encourage all librarians and library

staff to invest in themselves by taking charge of their careers. Hakala-Ausperk advises you to design a training program for yourself in order to achieve growth in a particular area, develop a strategy that will focus your learning, and get better at what you do and grow professionally throughout your career. At the beginning of each year, she advises you to start with two or three goals—things you would like to accomplish. Make a plan to achieve these goals and monitor your progress every three months. Next, measure your progress and celebrate your successes along the way. And we would add to her advice: learn from your failures.

Growth and development frequently require taking some risks and trying new experiences, which may not always be as successful as you originally envisioned. However, reflecting upon experiences, which may result in failures or partial success, can often provide you with greater learning opportunities than your easy successes. Figures 0.2 and 0.3 provide forms to get you started in designing your own plan.

*Goals for Action Plans.* For specific goals (often called objectives) to be more useful, they should be written in the SMART format, where S = Specific, M = Measurable, A = Attainable, R = Realistic, and T = Timely (Mindtools, n.d.). A specific goal has a much greater chance of being accomplished than a general goal. A specific goal should answer these six “W” questions:

- Who: Who is involved?
- What: What do I want to accomplish?
- Where: Identify a location.
- When: Establish a time frame.
- Which: Identify requirements and constraints.
- Why: Identify the specific reasons, purpose, or benefits of accomplishing the goal.

For example, a general goal would be, “Get in shape.” But a specific goal would be, “Join a health club and work out three days a week.”

For goals to be measurable, you should establish concrete criteria for measuring your progress toward the attainment of each goal you set. When you measure your progress, you stay on track and you reach your target dates. To determine if your

**COMPETENCY TO BE ADDRESSED**

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*(HINT: Start by reviewing the RUSA “Professional Competencies” and considering, possibly in consultation with others, your first priority for enhancing your knowledge and skills)*

**Timeline:** \_\_\_\_\_

**Possible Strategies\* to Achieve Growth in Skills and Knowledge in the Selected Competency**

Reshaping your job: \_\_\_\_\_

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---

Temporary assignments: \_\_\_\_\_

---

---

Outside activities: \_\_\_\_\_

---

---

People to consult:

Peers: \_\_\_\_\_

Your manager: \_\_\_\_\_

Others: \_\_\_\_\_

Plan of support: \_\_\_\_\_

---

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Plan for feedback: \_\_\_\_\_

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Necessary resources: \_\_\_\_\_

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\*NOTE: Evaluate the strengths and weaknesses of each possible strategy you list in terms of support from significant others that you will need to do the developmental assignment, and consider McCauley’s (2006) list of job characteristics that stimulate learning opportunities: unfamiliar responsibilities; new initiatives; solving existing problems; dealing with employee problems; managing work with high stakes and/or visibility; managing work that is broad in scope and/or large in scale; managing relationships with groups outside of the organization; influencing key people when you do not have authority over them; working across cultures; and working with diverse groups.

**FIGURE 0.2** ● *Development Assignment Plan*

<b>Employee Name/ Employee ID:</b>	<b>Current Position Description Number / Title / Series / Grade:</b>	<b>Organizational Unit:</b>	<b>Appraisal Period Date:</b>  (Example: 05/03/2012- 05/02/2013)
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The Library seeks to model a high-performance culture that encourages, supports, and invests in the development of its staff. Professional development is an ongoing process to ensure that employees are staying current, if not one step ahead in their fields and mission-critical competencies.

This plan is intended to:

- Encourage each employee to take ownership of his or her career development
- Provide an administrative mechanism for identifying and tracking development needs and plans
- Assist in planning employee training and development activities
- Align employee development with the mission, goals, and objectives of the Library and the Service Units (SU)
- Allow supervisors to develop a better understanding of their staff’s professional goals, strengths, and development needs
- Provide a basis for discussion periodically and tracking progress throughout the year

Additionally:

- Development goals will assist the employee in becoming stronger in his or her current role or expanding on strengths currently demonstrated—these are goals for improving over the next year
- Development goals also will relate to preparing the employee for future roles or foreseeable changes in existing roles
- Specific training activities should be entered and tracked electronically through the “My Plan” portion of the Online Learning Center
- Goals expressed in the plan should be viewed as flexible and are subject to resource constraints
- Resources that can be used by both the employee and supervisor to create this IDP include: position description, performance plan, performance appraisal, performance targets, annual objectives, SU strategic plans, unit priorities, and the Library of Congress Strategic Plan 2011–2016

	<b>Goal</b> (Describe the observable competency, knowledge, skill, or ability you would like to enhance or develop)	<b>Target Completion Date</b>	<b>Core Competency Addressed</b> (optional)	<b>Category</b> 1) Position essential 2) Career development 3) Persona development	<b>Developmental Activities</b> (Examples: shadowing, detail, just-in-time learning, conference, online or classroom training, reading, Toastmasters, coaching, mentoring)	<b>Progress Made/ Next Steps</b>
<b>1</b>						
<b>2</b>						

**FIGURE 0.3** • *Library of Congress Individual Development Plan*

	<b>Goal</b> (Describe the observable competency, knowledge, skill, or ability you would like to enhance or develop)	<b>Target Completion Date</b>	<b>Core Competency Addressed</b> (optional)	<b>Category</b> 1) Position essential 2) Career development 3) Persona development	<b>Developmental Activities</b> (Examples: shadowing, detail, just-in-time learning, conference, online or classroom training, reading, Toastmasters, coaching, mentoring)	<b>Progress Made/ Next Steps</b>
<b>3</b>						
<b>4</b>						
<b>5</b>						

Employee Signature and Date: \_\_\_\_\_ Supervisor Signature and Date: \_\_\_\_\_

NOTE: This form supports individual employee development. For more information, contact your SU point of contact for WPM or Alison Pullins, HRS/WPD at (202) 707-1130 or apul@loc.gov.

goal is measurable, ask questions such as: How much? How many? How will I know when it is accomplished?

Goals should be realistic and attainable. Goals should be neither out of reach, nor below standard performance. An attainable goal may stretch an individual or team, and help individuals or groups grow and expand to match their goals. Planning steps wisely and establishing a time frame that allows you to carry out those steps are necessary for goals to be attainable. An attainable goal will usually answer the question: How can the goal be accomplished?

To be realistic, a goal must represent an objective toward which you are both *willing* and *able* to work. A goal can be both high and realistic; you are the only one who can decide just how high your goal should be. But be sure that every goal represents substantial progress. A high goal is frequently easier to reach than a low one because a low goal exerts low motivational force. Some of the hardest jobs you've ever accomplished actually seemed easy simply because they were a labor of love. Additional ways to know if your goal is realistic is to determine if you have accomplished anything similar in the past, or to ask yourself what



conditions would have to exist to accomplish the goal. To conduct additional analysis of how realistic a particular goal is for you, Faithe Ruiz (2017) has developed a personal SWOT analysis to use.

*Timeliness.* A goal should be grounded within a time frame. With no time frame tied to it, there's no sense of urgency. A commitment to a deadline helps a team focus their efforts on completion of the goal on or before the due date. This part of the SMART goal criteria is intended to prevent goals from being overtaken by the day-to-day crises that invariably arise in an organization. A time-bound goal will usually answer the questions:

- When?
- What can I do six months from now?
- What can I do six weeks from now?
- What can I do today?

“T” can also stand for “tangible”—a goal is tangible when you can experience it with one of the senses, that is, taste, touch, smell, sight, or hearing.

## ENHANCING YOUR PROFESSIONAL COMPETENCIES

How can reference and user services librarians maintain and enhance their professional competencies? Professional development activities are sometimes divided into three broad categories: (1) development activities that emphasize job experience; (2) development activities that focus on developing and maintaining relationships; and (3) formal methods of education and training. Although librarians are more likely to think of “professional development” activities as participating in conferences, attending workshops, and enrolling in formal courses and degree programs, often the most accessible and least expensive development opportunities are local ones.

## ON-THE-JOB EXPERIENCES

Much of the growth and development for professionals is created by rich on-the-job experiences,

which provide the potential for updating current skills and learning new ones. Professional development can thus be pursued using “development in place” (McCauley, 2006). Development in place does not require a major job shift or a move to a different organization; however, it does require adding new responsibilities to your present assignment or taking on temporary tasks. Also, developmental assignments might include challenges outside the workplace, for example, in community nonprofit or social organizations.

A key component that is present in developmental assignments is work that requires learning new knowledge and skills and which provides opportunities to perform challenging and difficult tasks. Attebury (2017) studied the professional development experiences of academic librarians and found that when librarians reported transformational experiences, none of the experiences involved routine on-the-job activities. Developmental assignments can include activities such as shadowing, internships, interviews with experts, mentoring, reading, research, developing training courses, and teaching skills to other staff. Cynthia McCauley's handbook *Developmental Assignments* (2006) is intended to help people seek out and design their own developmental assignments. She provides many strategies for broadening your practical experiences by reshaping your job, adding a temporary assignment, or seeking a developmental challenge outside of the workplace. According to McCauley, the key job characteristics that stimulate learning are opportunities to experience:

1. Unfamiliar responsibilities
2. New initiatives
3. Solving existing problems
4. Dealing with employee problems
5. Managing work with high stakes and/or visibility
6. Managing work that is broad in scope and/or large in scale
7. Managing relationships with important groups outside of the organization
8. Influencing key people when you don't have authority over them

- 9. Working across cultures
- 10. Working with diverse work groups

When seeking developmental assignments, you need to evaluate the assignment in terms of these key job characteristics.

One section of *Developmental Assignments* is focused on developing competency-driven assignments through use of the Center for Creative Leadership's Model of Leader Competencies. However, the RUSA "Professional Competencies" reflect many of these same key characteristics, particularly those related to developing collaborative partnerships; building and maintaining relationships; communicating effectively; responding to diversity in user needs, communities and preferences; and planning, implementing, and evaluating innovations. In the competency-driven assignment, the assignment must provide the opportunity to practice a specific skill.

In the reference field, studies over past years have demonstrated the value of practical experience in learning new skills. For example, Luo (2009), in a study on chat reference training, reports that "hands-on experiences" received the highest rating of all training techniques. The next most effective method was asking questions of real chat reference users. In a classic study on effective training methods, Gers and Bolin (2000) report that in order to be effective, reference interview skills training needs to focus on model reference behaviors, include sufficient practice, and incorporate peer coaching. Librarians truly do value learning by doing.

Therefore, people who want to develop all types of skills cannot wait around and hope that management will assign them some interesting responsibilities, which will allow them to grow. Rather, people should approach their managers and negotiate growth opportunities. Annual goal-setting as part of a performance evaluation often provides an opportunity for this, but you can take advantage of many other opportunities in the course of your daily activities as well. You could ask your boss to delegate one of her responsibilities to you with feedback on how you're doing on a regular basis, or you could trade responsibilities with a colleague and provide peer coaching to each other. If the organization has

a job rotation program, you could participate in the program, actively seeking feedback on your performance from each department or unit. In her study of professional development experiences, Attebury (2017) found that on-the-job learning is one of the most inexpensive and convenient approaches and provides long-term, interactive, and self-assessment opportunities.

## RELATIONSHIPS

Development activities that focus on developing and maintaining relationships include attending professional conferences, informally engaging in peer instruction on the job, coaching by managers or with peers, reading the professional literature, participating on discussion lists, and writing or editing articles in the professional literature. In Attebury's (2017) study, meaningful and transformational professional development experiences were related to long-term activities and interactions with peers and fellow learners.

## FORMAL EDUCATION AND TRAINING

Formal methods of education and training can include certificate or degree programs, courses, seminars and workshops offered by employers, educational institutions, and professional associations. Often the formal methods of education are costly because of registration fees and travel. However, new learning formats such as online education may decrease costs and make formal education opportunities more affordable.

Because the authors endorse the view that the hallmark of a professional is taking responsibility for his or her own development, informal methods of education, development through experience, and learning through relationships will be emphasized throughout this book. A wide variety of professional updating activities are available, and recommended methods for enhancing certain competencies will be discussed in each of this book's seven chapters.

## ASSESSING YOUR DEVELOPMENT EFFORTS

Assessment is an important form of self-development. As part of assessment, individual librarians identify their own strengths and weaknesses. Thus, assessment techniques can help individuals determine their competency level and develop a plan for what they want to achieve. Self-evaluation—critical reflection on one’s own skills, abilities, and knowledge—is valuable in figuring out what is required for a career that will be personally satisfying.

The RUSA competencies are defined specifically so that performance can be evaluated. Competency can only be inferred from performance. Therefore, one needs to focus on the types of performance that will assist in making judgments about individual competence. Generally, evaluating competency—the extent to which a task or set of tasks can be performed—is best done in a real-world setting. Evaluation should be linked to goals and therefore should compare performance with the competency goals.

Multiple methods of assessment are valuable, and the methods selected should be those that are the most direct and best-suited to judging performance related to a specific competency.

The major methods for assessing professional competence are through supervisor evaluation, self-evaluation, peer evaluation, testing or on-the-job performance, outside consultants or external reviewers, and special projects. Other methods, which may have potential but are less commonly employed, are evaluation by subordinates and evaluation of individual librarian performance by patrons. The 360-degree feedback appraisal method suggests that those receiving the service and those being supervised should be queried as part of performance evaluations. This appraisal method (Law, 2016) is “a system that provides employees with all-round performance feedback from colleagues, manager(s), customers, and others. Crucially, it also compares the individual’s self-perception with performance ratings supplied by others.”

## Self-Assessment

Accurate assessment of performance strengths and weaknesses is key to setting learning goals and identifying the most vital competencies for professional growth. In the future, an important component for knowledge professionals will be self-assessment—that is, reflecting upon and assessing your performance regularly and using the results of the assessment to strengthen your performance. Self-assessment is regarded as a basic foundation for a self-regulating professional (Mann, 2010). Practicing self-assessment encourages people to take responsibility for their own learning.

A worksheet (figure 0.4) for the self-assessment of learning can be used to reflect upon your transfer of learning in workshops into everyday life and practice. In addition, the worksheet can easily be modified to help reflect upon transferring your learning in developmental assignments to your regular daily work activities.

## Assessments by Supervisors and Others

However, self-assessments are subject to individual bias, which often results in an inability to judge one’s own performance accurately. Therefore, librarians must also take responsibility for incorporating assessment information from external sources, such as managers, customers, and peers, in order to achieve a more reliable picture of their overall performance. One source which can be useful in generating feedback from others is Coaching Ourselves ([www.coachingourselves.com/](http://www.coachingourselves.com/)), which is committed to self-development and self-directed learning. In this format, a team gets together over lunch every couple of weeks to reflect upon their experience on a particular topic.

One could also solicit the help of the supervisor in developing a follow-up questionnaire that can be administered at a later date, after a month, for example. In developing the questionnaire, consider using formats such as checklists, rating scales, incomplete sentences, and short essays. Other questions

**LEARNING EVENT:** \_\_\_\_\_ Date: \_\_\_\_\_

How is the content of the learning event relevant to my professional development goals?

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

What did I learn that might be useful in my professional practice?

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

What aspects of my professional practice do I hope to change as a result of what I learned?

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

What opportunities can I identify to apply what I have learned to my professional practice?

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

I plan to discuss these ideas with: \_\_\_\_\_

Did workplace colleagues attend this learning event with me?  Yes  No

If yes, what ideas do colleagues think might be worth implementing in the workplace? \_\_\_\_\_

How will I share ideas from the learning event with my colleagues who did not attend?

\_\_\_\_\_

\_\_\_\_\_

Do you think colleagues will be interested in incorporating some of these ideas into their professional practice?

Yes  No

For the new ideas presented in the learning event, list resources (media, reading, etc.) to explore:

\_\_\_\_\_

\_\_\_\_\_

Did the learning event include any tools useful in transferring learning into practice?  Yes  No

If yes, please describe: \_\_\_\_\_

\_\_\_\_\_

Will the learning event have another session, after I have had an opportunity to integrate the learning into practice and reflect upon the results?

Yes  No

**FIGURE 0.4** ● *Transferring Learning into Practice*

you might consider are asking about what is remembered the most, what skills are currently being used, and what success you've had. This offers a follow-up for application questions.

Each chapter in this book will include recommended self-assessment activities, such as writing up notes from group discussions, fact-finding, practical exercises, short verbal and written reports, short presentations on a topic, and providing concrete

examples of how one's skills were applied in the workplace. Because professionals are expected to take responsibility for their own development, they also need to take the primary responsibility for assessing their progress in obtaining and enhancing their professional competencies. Therefore, the authors of this book will focus primarily on self-evaluation or self-assessment activities.

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