



# Montana State Library Personal Professional Development Plan Pathway

## Montana State Library Certification Program

This manual outlines the purpose and procedures for Montana librarians seeking a Montana State Library Certificate utilizing a personal professional development plan and/or self-directed study for credit.



# Montana State Library Personal Professional Development Plan Pathway

## Key components

- **Adaptable:** Applicants design their own plan for their professional development based on their own learning needs and the strategic goals of their library
- **Emphasizes interdisciplinary learning, project-based learning, exploration and discovery.**
- **Links** the librarian's professional development to the **strategic goals** of the library.
- **Challenges librarians** to design their professional development plan in a coordinated, functional and reflective way, taking stock of what they already know, and identifying their gaps in knowledge and skill and then planning ways to address those gaps.
- **Encourages mentorship;** self-directed learning requires a mentor be identified to assist the learner
- **Core Curriculum** for first-time applicants to assure that the basic foundations of librarianship are held by all.
- **Data for planning MSL training activities** will be available as applicants submit their PPD Plans.

## Outcomes

- **Applicants** design rigorous professional development to advance their careers in librarianship
- **Libraries** utilize the pathway to advance the strategic goals of the library
- **MSL staff** organize training activities into a coordinated curriculum addressing the needs of librarians as informed by the data provided in PPD Plans. Data is accessible and organized in planning training activities

### Timeline for PILOT 2018

- June - Present to Montana State Library Commission; Forms and manual finalized
- July - Recruit 5 participants or 5 participating libraries (one library per MSL staff to facilitate continuous feedback, and quality assurance) Applications Due August 3rd  
Outline “Foundations of Librarianship” core curriculum
- August - Selection of participants in the pilot made by August 7<sup>th</sup>; Initial webinar with participants; Participants meet with supervisor, begin work on PPD Plans; submit plan forms to MSL  
MSL staff meet with participants and supervisors to provide assistance and collect feedback
- September - All PPD Plans for pilot participants are approved by supervisors, submitted to MSL and reviewed; Self-directed learning proposals begin to be submitted and reviewed  
MSL staff conduct formative evaluation based on feedback from participants; Adjustments as needed in forms, process, support
- October – November - Interim PPD Plans & self-directed learning proposals are submitted and reviewed; Feedback meetings with mentors and directors focus groups or individually  
MSL staff meet to capture feedback and suggest improvements; adjustments as needed
- November – December - Meet with all participants collectively in focus group(s);  
Questionnaire feedback  
Report to the MSL Commission – recommendation and decision  
MSL staff complete “Foundations of Librarianship” online course

NOTE: Pilot participants will be permitted to complete their certification using this pathway regardless of the decision to go forward or not.

To participate in the PPDP Pathway successfully, applicant-learners must:

- Currently work at a Montana library
- Have permission and support of their supervisor
- Have a current strategic plan in place at their library
- Be willing to seek out professional development opportunities to meet their specific needs which may extend beyond traditional library training activities
- Assess their current skills and knowledge and engage in the reflective practice required to develop a PPD Plan
- Have access to a mentor, if seeking self-directed credit activities or project-based learning credit
- Be self-reliant and self-motivated

Participation is recommended for:

- Learners who aspire to engage in a long-term initiative to significantly improve their skillset or develop a new area of expertise
- Learners who need to focus in on a special topic or retrain in a new area to develop a new area of expertise in order for their library to meet its strategic goals
- Learners who have already specialized in their work and do not need ten credits in each of the four categories as required under the traditional pathway, but do need rigorous training within their specialty
- Learners who intend to embark on a program of study or research that is beyond the traditional landscape of library learning

## What is a Personal Professional Development Plan?

A **Personal Professional Development Plan** is a document that is usually created as part of an employee's work plan or in response to a performance review. The Plan outlines the talent, skills, and knowledge advancement that is desired for an employee, and sets in place the methods for achieving that advancement. Methods to advance an employee's talent could include reading and research, working in an apprenticeship-style situation, seeking guidance from a mentor, or merely trying out something new. Of course, traditional classroom learning, online tutorials, and webinars are often part of the plan as well. The employee proposes the methods and activities that they think will advance their skills, and the supervisor approves the plan after providing input and suggestions. Plans are dynamic documents and subject to adjustment as the employee advances. A plan could cover a few months of intense professional development or a period of a few years.

## What is Self-Directed Learning?

**Self-directed learning** is a broad term that encompasses a range of learning activities or instructional methods. In the context of this PPDP Pathway, it is not *informal learning* because learners must apply some time to reflect about and submit a proposal for their learning activities. In other words, self-directed learning for CE credit doesn't just happen on its own. To earn credit, learners must prepare for and submit a plan for their self-directed learning activities in advance, linking each activity to their library's strategic plan and securing the approval of their supervisor. Examples of self-directed learning are extended work on a project such as the projects developed by the Summer Library Leadership Institute (see more information here), traveling to another library to observe and learn, conducting research and compiling data, working in an apprenticeship role or with a mentor to advance skills and knowledge. Viewing a series of short tutorials and engaging in your own practice afterwards to gain mastering of a specific skill or task also qualifies for credit as self-directed learning.

The PPDP Pathway provides CE credit for self-directed learning at the rate of 3 hours of work = 1 CE credit. Up to 30 of the 60 credits required for certification may be earned through self-directed learning.

## FAQs

**Can I keep my existing CE credits?** Yes, the PPDP Pathway is intended to be a combination of formal instructional classes or webinars and self-directed learning. Self-directed learning can comprise no more than 30 credits total of the 60 required for certification

**What about the CE categories?** For the PPDP Pathway, there is no requirement to apply any credits to any categories, just 60 credits total. Instead, the learner's PPD Plan links their proposed professional development activities to the library's institutional goals.

**Is self-directed learning required?** No, a learner can attain all 60 credits in formal classroom or webinar activities and attain a certificate using the PPDP Pathway. For the pilot, though, MSL staff are looking for librarians that want to include at least some self-directed learning in their PPD Plan.

**Must all learning be library-specific?** No, the PPDP Pathway allows for a librarian to explore learning in an area outside of traditional library work, as long as those learning activities advance the institutional goals of the library.

**Why is the pilot limited to such a small number – no more than 5 libraries?** MSL staff cannot accurately predict how much staff time it will take to manage the PPDP Pathway. This model for certification has not been implemented by other state library agencies, so there is little existing information to rely on for designing the PPDP Pathway. There is a lot for MSL staff to learn about this proposed pathway, so working with a small number will allow MSL to assign one person per library or per learner to get constant feedback during the pilot period so that we can make adjustments to the program and be sure it is sustainable before it is launched statewide.

## STEP ONE: WRITE GOALS for PPD Plan

The applicant and their supervisor meet to review the library's strategic plan and the specific role of the applicant in meeting the goals of the plan. Each goal the applicant creates for their PPD Plan must correlate to one or more goal(s) in the library's strategic plan. Together, the applicant and their supervisor should identify knowledge or skill needs and suggest the specific way that the applicant will address those needs, setting the number of credit hours anticipated to meet that applicant's learning needs for that specific goal. **60 credits minimum.**

First time applicants who have not received a certification from the MT State Library before, should include the "Foundations of Librarianship" course work as the first goal. <<<NOTE: this course will be developed during the pilot phase with input from the participating applicants. The requirement for pilot participants is to assist in the creation of the course if requested.>>>

Keep in mind:

- PPD Plans should focus on a few professional development goals or one goal to give the plan focus. This pathway for certification is intended to go deep. If a more general approach is what is needed, the applicant should use the traditional pathway to certification.
- All PPD Plans must be completed within 48 months or less. Credits earned that are beyond 4 years old are considered expired and void.
- Include standard credits for traditional training events such as attendance at workshops or webinars using the 1 hr = 1 credit standard
- For self-directed learning that is formal, prepared learning activities such as an online tutorial, bundle the time spent into 30-minute or more blocks for no less than ½ credit. Total study of less than ½ hour to complete is not eligible for credit.
- There is no need to assign a category to your planned activities. The emphasis is on the library's goals, not on categories.
- Consider how self-directed learning activities learning can be applied in the plan. The plan should include some training outside of the traditional seminars, workshops and webinars. Independent research and analysis are good options to consider including as well.
- For training that is not library-specific, be clear about how that training helps the library meet its goals. For example, training in instructional design or computer networking may be appropriate for a PPD Plan if the library needs those skills to meet their strategic goals.
- Use the standard formula for converting college credits to CE credits. (See CE Manual online here: [http://libraries.msl.mt.gov/consulting/online\\_publications/certificationmanual/cecredits/forcollege](http://libraries.msl.mt.gov/consulting/online_publications/certificationmanual/cecredits/forcollege) )
- For research or project-based learning, convert 3 hours of work into one CE credit.

## Step Two: Submit PPD Plan to Montana State Library

Use the form provided in the Appendix of this manual, “Personal Professional Development Plan” to submit the initial plan. Submit the plan to the CE Coordinator, Jo Flick via email [jflick@mt.gov](mailto:jflick@mt.gov).

The form must be signed by the applicant and library supervisor. The MSL CE Coordinator or Library Development and Statewide Projects Director will provide feedback on the plan, request any adjustments necessary, and approve the plan.

## Step Three: Learning Activities

Applicant-learners select their own activities according to their plan from appropriate providers or through self-directed learning, in consultation with their supervisor or mentor, as appropriate.

## Step Four: OPTIONAL – Self-directed Learning Form

A unique feature of the PPDP Pathway is the option to plan and implement a self-directed learning experience. Self-directed learning may include formal and informal learning that may not normally be considered eligible for CE credit under the traditional pathway to certification from the MSL. Learners may take time to experiment with a new technology, conduct research, make a trip to observe a colleague, participate in project-based learning activity, or any other activity that results in a greater skill or knowledge.

To be considered for credit, self-directed learning activities must:

- Be part of the PPD Plan and aligned to the library’s goals
- Be pre-approved by the applicant’s supervisor
- Identify at least one mentor (which may be the supervisor)
- State the desired outcome(s) for the applicant and the impacts on the library or community
- Account for no more than 30 credits maximum
- Use a formula where 3 hrs of work on self-directed learning is equal to 1 CE credit, except for formal classroom instruction or formally structure webinars where 1 hour is equal to 1 credit.

The applicant-learner must complete the *Self-Directed Learning Form*, gain signatures from their supervisor and mentor and submit that form to MSL for approval, similar to the original PPD Plan, before beginning self-directed learning. During each self-directed learning activity, applicant-learners are encouraged to keep a journal of their work, noting the approximate times spent on each activity or experience. Frequent meetings with the mentor are expected. A claim for credit at the completion of the self-directed learning activity will include a statement within the *Summative Report Form* about the learning activities, experience, and any evidence of achieving the desired outcome(s) and impact(s).



## Step Four: Interim Progress Report(s)

Applicant-learners must complete and submit at least one *Interim Project Report Form* during their study under the PPD Plan Pathway. This requirement is intended to guide the applicant-learner to reflect upon their learning and make mid-course corrections to their plans, if needed. The *Interim Progress Report Form* also serves to inform MSL staff about training needs which they use to plan training events.

Applicants may change course more than once, as PPD Plans are often dynamic documents and learning is a journey that often leads to a new trail worth exploring. As a learner discovers a new need or recognizes that the time they had estimated to learn a new skill was not needed or perhaps much longer than they had planned, they may adjust their plan, working with their supervisor, and submit an *Interim Progress Report Form* to MSL to note changes.

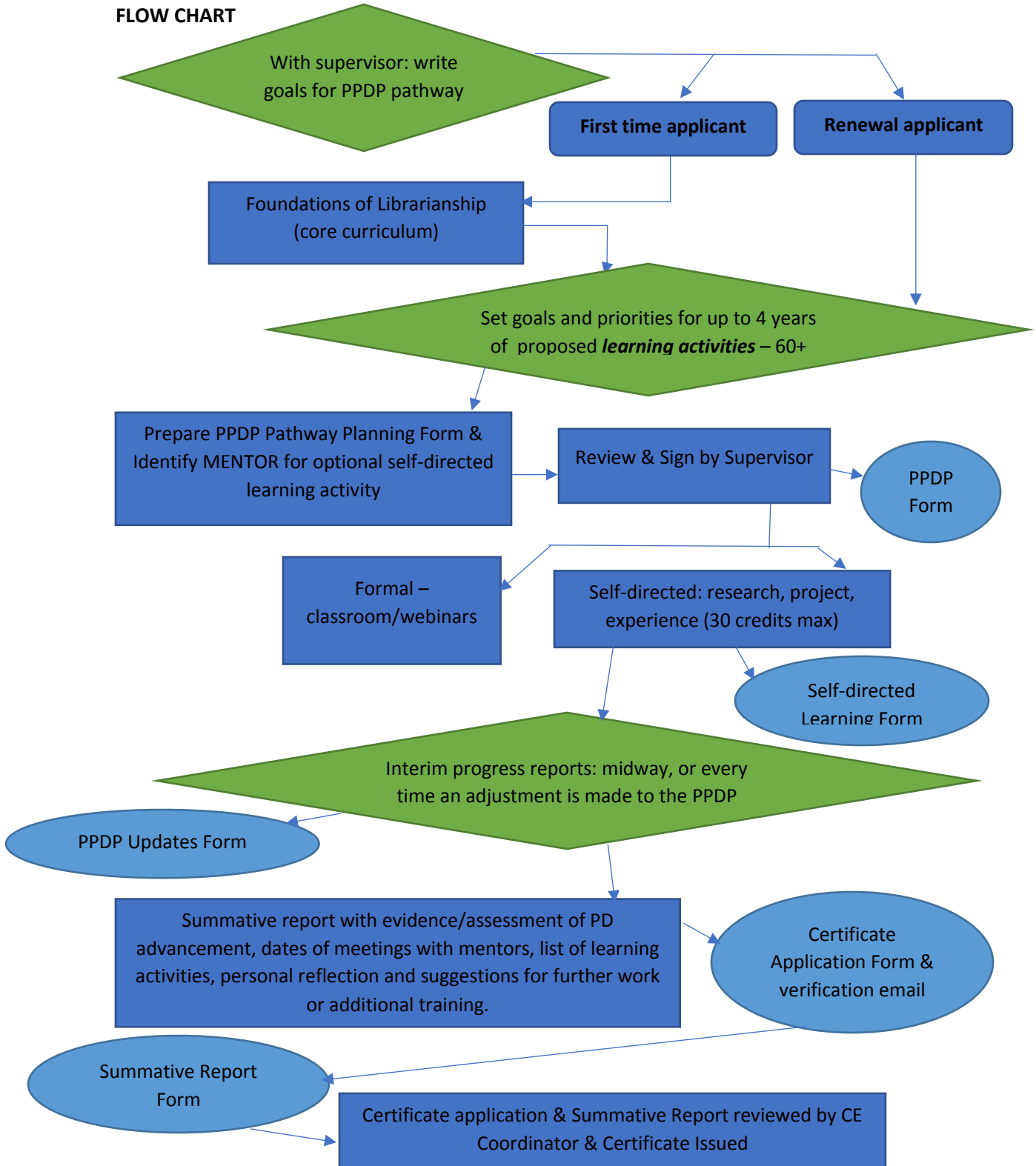
## Step Five: Summative Report

Upon completion of the PPD Plan and any interim adjustments, the applicant completes a *Summative Report Form* to report on the outcome(s) and impact(s) achieved and to provide MSL any evidence of those outcome(s) and impact(s). The form includes a reflection of their learning experiences, any feedback on the pathway for MSL to make improvements and their thoughts about the next steps in their continuing education. The *Summative Report Form* is submitted at the same time as the final step in the PPD Plan Pathway: the *Application and Verification*.

## Step Six: Application for Certification and Verification

Applicants complete the standard *Application for Certification*. All applicants under the PPD Plan Pathway may select specializations if their plan included the equivalent of 20 or more credits in that specialization area. Otherwise, all applications submitted via the PPD Plan Pathway are considered Library Administration Track Certificates, and meet the requirements of public library directors under the Montana Public Library Standards.

**FLOW CHART**



## APPENDICES

PPD Plan Form

PPDP Updates Form

Application for Certification Form

Summative Report Form

## Montana State Library Certification Program Personal Professional Development Plan Pathway Planning Form

Applicant Last Name:

First Name:

Email address:

Phone:

Library:

Supervisor's name:

What is your reason for utilizing the PPD Plan Pathway to MSL Certification?

List at least one **OUTCOME** that you expect to achieve:

List at least one **IMPACT** that your learning will likely have on your library or community:

On the next page(s) List your anticipated learning activities both formal training (classes or webinars) and self-directed learning, the goals from the library's strategic plan that correlate to each activity, the anticipated credits for each activity. For each self-directed learning experience planned, complete a Self-directed Learning Form.

Sign and date this form below:

\_\_\_\_\_ date  
Applicant

\_\_\_\_\_ date  
Supervisor

### Planning Form - page two

Learning activity or experience:	Related to this library goal:	credits

## Montana State Library Certification Program Personal Professional Development Plan Pathway Self-directed Learning Form

Applicant Last Name:

First Name:

Email address:

Phone:

Library:

Supervisor's name:

Mentor's name:

Title for this project or topic focus:

Number of credits anticipated for this self-directed learning activity (maximum credits allowed through self-directed learning are 30; calculate time spent on informal learning activities as 3 hours work is equal to 1 hour credit ) \_\_\_\_\_

List at least one **OUTCOME** for this self-directed learning proposal:

**Complete the form on the next page listing your planned activities and experiences.**

Applicant-learner agrees to keep a journal of their activities and to log their time accurately. Supervisor and Mentor agree to assist the learner to achieve the outcome(s) desired with this self-directed learning experience.

Applicant: \_\_\_\_\_ date: \_\_\_\_\_

Supervisor: \_\_\_\_\_ date: \_\_\_\_\_

Mentor: \_\_\_\_\_ date: \_\_\_\_\_

(if different than the supervisor)

**Self-directed Learning Form – page two**

Describe the learning activities and experiences planned and the anticipated hours for each:

Learning activity or experience	Time (in .5 hour increments)

How will this learning advance the goals of your library? List at least one goal that it will address and how the learning activity will address it:

Library goal(s):

References (cite resources or describe the preparation done that informed this proposal):

**Sign the first page of this form before scanning and submitting to [jflick@mt.gov](mailto:jflick@mt.gov) or ask your supervisor to submit the form as an attachment to an email.**

# Montana State Library Certification Program Personal Professional Development Plan Pathway Interim Progress Report Form

Applicant Last Name:

First Name:

Email address:

Phone:

Library:

Supervisor's name:

What OUTCOME(S) have you achieved?:

List OUTCOME(S) that remain or any new OUTCOME(S) desired:

What hurdles or opportunities have you encountered that you didn't expect? Please note how you plan to handle those hurdles or opportunities going forward:

On the next page(s) provide a brief update on your planned learning activities, goals from the library's strategic plan that correlate to that activity, the anticipated credits for each activity. Note any activities that were planned, but are now no longer necessary. On Page Three, list any new or revised learning activities or experiences planned. Sign and date this form below:

\_\_\_\_\_ date  
Applicant

\_\_\_\_\_ date  
Supervisor



### Interim Report Form - page two

Learning activity or experience:	Progress to date:	credits

**Interim Report Form – page three**

New planned learning activity:	Related to this library goal:	Credits

## Montana State Library Certification Program Personal Professional Development Plan Pathway **Summative Report Form**

Applicant Last Name:

First Name:

Email address:

Phone:

Library:

Supervisor's name:

What OUTCOME(S) have you achieved?:

What IMPACT(S) have you been able to observe at your library or in your community?:

Based on this professional development experience, what advice would you give to someone else considering a self-directed learning experience?

Please rate your learning experience with the following 4 questions which are required for the Montana State Library to collect when assessing training activities:

1. I learned something by participating in this library activity:
  - strongly disagree
  - disagree
  - neither agree nor disagree
  - agree
  - strongly agree
2. I am confident about using what I have learned:
  - strongly disagree
  - disagree
  - neither agree nor disagree
  - agree
  - strongly agree
3. I am likely to apply what I have learned:
  - strongly disagree
  - disagree
  - neither agree nor disagree
  - agree
  - strongly agree
4. Applying what I learned will help improve library services to the public:
  - strongly disagree
  - disagree
  - neither agree nor disagree
  - agree
  - strongly agree

Additional comments or suggestions for MSL staff: