

Montana State Library Strategic Track Manual

Montana State Library Certification Program

This manual outlines the purpose and procedures for Montana librarians seeking a Montana State Library (MSL) Certificate utilizing a personal professional development plan and the strategic credit to earn credit toward MSL certification.



Montana State Library Strategic Track Manual

# Outcomes

* **Applicants** design rigorous professional development to advance their careers in librarianship
* **Libraries** utilize the strategic track to advance the goals of the library
* **MSL staff** organize training activities to address the needs of librarians as informed by the data provided in strategic track forms.

# 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
* **Deep Learning:** Emphasizes interdisciplinary learning, project-based learning, exploration and discovery
* **Directly Advances Library Goals:** the librarian’s professional development plan is linked 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 encourages learners to seek a mentor
* **Specialization:** Seasoned librarians may focus there learning In one or two areas of study
* **Advanced Learning:** The strategic track is only available to librarian that have earned MSL certification through the staff or administrations track
* **Data for planning MSL training activities** will be available as applicants submit their PPD Plans

# To participate in the strategic track successfully, applicant-learners must:

* Have already achieved MSL certification in the staff or administrator track
* 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 personal professional development plan
* Be self-reliant and self-motivated

# Participation is recommended for learners who:

* aspire to engage in a long-term initiative to significantly improve a specific skillset or develop a new area of expertise
* need to focus in on a special topic or retrain in a new area to develop a new area of expertise in order to advance their library’s strategic goals
* have already specialized in their work and do not need ten credits in each of the four categories as required under the staff or administrator tracks
* wish to embark on a program of study or research that is beyond the traditional landscape of library learning to advance their library’s goals

## Definitions

# What is a Personal Professional Development Plan?

A ***Personal Professional Development Plan*** is a document that is usually created as part of an employees 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 the MSL strategic track, it a planned learning activity that is not attending a seminar, presentation or webinar. In the strategic track, learners must reflect about what learning they need and submit a proposal form in advance for their planned learning activities. Self-directed learning for CE credit doesn't just happen on its own, it is in response to the learner identifying a learning need or knowledge gap and planning a process to address it. 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 or the Ready2Read Rendezvous, 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 or viewing a series of short tutorials and engaging in your own practice afterwards to gain mastery of a specific skill or task also qualifies for credit as self-directed learning.

The strategic track provides CE credit for self-directed learning at the rate of 3 hours of work = 1 CE credit. Up to 20 of the 60 credits required for certification may be earned through self-directed learning.

# FAQs

**Can I keep my existing CE credits?** Yes, the strategic track is intended to be a combination of formal instructional classes or webinars and self-directed learning. You can enter the strategic pathway with existing credits and they all count.

**What about the CE categories?**  For the strategic track, there is no requirement to apply any credits to any categories, just 60 credits total. Instead of categories, 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 strategic path.

**Must all learning be library-specific?**  No, the strategic track 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.

**What if I change libraries or change jobs at my library before I’ve completed credits toward certification?** If you are changing libraries or going to a new job, be sure to have your supervisor approve the credits you have earned before you make the change to secure your credits. Then, submit a revised PPD plan for your new job and secure the approval of your new supervisor. Credits that fit the traditional categories may also be also be collected in a staff or administrator track, if you prefer to attain your certification in one of those tracks.

**What if I start the strategic path, but then discover that I’m mostly earning credits in the traditional way?** Participants may wish to open more than one track in ASPeN to collect credits as they may find that it is easier to attain their certification in a staff or administrator track. That is entirely permissible.

**What are the benefits to a library?** Library directors who have veteran staff that have more specialized professional development needs will have the advantage of the planning tools in the strategic track to identify professional development activities for their staff. The planning tool in ASPeN describes desired learning topics and activities which can be used to plan travel and in-house training at the library. The strategic track also links staff learning directly to the goals of the library, so staff are using the library’s strategic plan as they consider their own professional development.

# STEP ONE: WRITE GOALS for Personal Professional Development (PDP) 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 gaps 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.**

The strategic track is only available for applicants that have already earned a staff or administrator certificate through the traditional tracks or by completing a masters degree in library/information science.

* 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 staff or administrator tracks 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 hour = 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. Learners may apply practice time where 3 hours of practice = 1 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. A rigorous plan may include some training outside of the traditional seminars, workshops and webinars, but this is not required. Independent research and analysis are good options to consider including. 3 hours of learning time spent = 1 CE credit for self-paced learning.
* Short self-paced tutorials may be bundled together to earn credit. A minimum of 30 minutes total is required for any credit; a bundle of 30-59 minutes is ½ credit, 60-89 minutes is 1 credit, 90-119 minutes is 1.5 credits and so on.
* 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)

# Step Two: Submit PPD Plan to Montana State Library

Login to aspen.mt.gov and navigate to the select tract page. Once you have selected the strategic track in ASPeN, Complete the PPD Plan form using the template on pages 10 and 11 in this manual. Once submitted, the designated supervisor will login to ASPeN and approve the plan. You can use the sample form in the appendix of this manual to write your plan and then transfer the information into the ASPeN form fields online when you are ready. Once you have attained your supervisor’s approval in ASPeN, you may begin to collect credits. Any credits you may have already earned will be dumped into your strategic path at that time as well.

# 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 strategic track is the option to plan and implement a self-directed learning experience. 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 and advances their library’s goals.

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
* State the desired outcome(s) for the applicant and the impacts on the library or community
* Account for no more than 20 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 must complete the *Self-Directed Learning Form* and get their supervisor’s approval recorded in ASPEN **before** beginning self-directed learning. During each self-directed learning activity, applicant-learners are required to keep a journal of their work, noting the date/times spent on each activity or experience. Frequent meetings with their mentor or supervisor 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 Five: OPTIONAL - Revised Professional Development Plan form

The *Interim Progress Report Form* is intended for those librarians who may need to alter their professional development plan. This may occur if the library has updates to their strategic plan, if the librarian changes jobs, or if the original professional development plan results in too much or two little work. A participant in the strategic track may alter their plan as often as needed, provided that each time the plan is altered, the new plan is approved by the participant’s supervisor and activities are linked directly to the library’s strategic goals.

Professional development plans often need to be dynamic documents. Learning is a journey that often leads to a new area of interest 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 *Revised Professional Development Plan form* to MSL to note changes.

Note: a revised plan must be in place before a participant begins to collect credits outside of their existing plan. Credits may not be claimed after the fact.

# Step Six: Summative Report

Upon completion of the Professional Development 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 and thoughts about the next steps in their continuing education. The *Summative Report form* is submitted at the same time as the final steps in the strategic track: *Application* and *Verification*.

# Step Seven: Application for Certification and Verification

Applicants complete the standard *Application for Certification*. All applications submitted via the strategic track are considered Library Administration Track Certificates and meet the requirements of public library directors under the Montana Public Library Standards. There are no specializations noted on the certificate for participants in the strategic track.

**FLOW** **CHART**

Certificate application & Summative Report reviewed by CE Coordinator, verification received from supervisor & Certificate issued

Summative report & application for certification ASPeN.

Submit strategic track planning form in ASPeN

OPTIONAL: Self-directed: research, project, experience (20 credits max)

Formal – classroom/webinars

Supervisor signs into ASPeN & verifies approval

Set goals and priorities for up to 4 years of proposed ***learning activities*** – 60+ hours

With supervisor: write goals for PDP

OPTIONAL: Revised Professional Development Plan form in ASPeN

# APPENDICES

Professional Development Plan Form

Self-directed Learning Form

Revised Professional Development Plan Form

Application for Certification Form

Summative Report Form

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# Montana State Library Certification Program

## Strategic Track **Professional Development Plan**

Use this form to plan your learning – and then enter this information into the Strategic Track course in Moodle. You must submit this form BEFORE any credits may be claimed in the Strategic Track.

Applicant Last Name: First Name:

Email address: Phone:

Library:

Supervisor’s signature: name/title:

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

List at least one **OUTCOME** that you expect to achieve (an *outcome* is a statement that includes 3 parts: the intended audience (Be specific: ex. caregivers for children at the library, non library users, community entrepreneurs, front line librarians); what the audience will receive and the related benefit to the audience. The desired behavior or change in status from an outcome should be able to be observed or measured. Sample outcomes statement: *Librarians assisting patrons with the 2020 Census will be able to access the correct forms for patrons and direct them to qualified help so that they can complete their census forms correctly and be counted*.

List at least one **IMPACT** that your learning will likely have on your library or community. Impacts describe the expanded or long-term value beyond the measurable and observable immediate outcomes. Impacts may not always be easily verified or documented. Sample Impact statement: *The county will have a complete count for the 2020 Census*.:

On the next page(s) List your anticipated learning activities both formal training (classes or webinars) and self-directed learning. List the goal(s) 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.

|  |  |  |
| --- | --- | --- |
| Learning activity or experience: | Related to this library goal: | credits |
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## **Professional Development Plan – page two**

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## Strategic Track

## **Self-directed Learning Form**

Applicant Last Name: First Name:

Email address: Phone:

Library:

Supervisor’s name: Mentor’s name (if applicable):

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.

## **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) |
|  |  |
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|  |  |

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):

How this self-directed learning will address the goal(s):

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

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## **Revised Professional Development Form**

Applicant Last Name: First Name:

Email address: Phone:

Library:

Supervisor’s name:

What OUTCOME(S) have you achieved?

List OUTCOME(S) that remain that you intend to keep:

List 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:

|  |  |  |
| --- | --- | --- |
| Original learning activity or experience: | Progress to date:  | Credits |
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## **Revised Professional Development Plan Form – page two**

## **Interim Report Form – page three**

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| --- | --- | --- |
| New planned learning activity:  | Related to this library goal: | Credits |
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# Montana State Library Certification Program

## Strategic Track

## **Summative Report Form**

Use this form when you are ready to apply for MT State Library Certification. You must have sufficient credits (minimum of 60) and have achieved at least one outcome from your Professional development plan or your revised plan.

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 see 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?

|  |  |  |
| --- | --- | --- |
| Learning activity  | Related to this library goal: | Credits earned |
|  |  |  |
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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
1. I am confident about using what I have learned:
	* strongly disagree
	* disagree
	* neither agree nor disagree
	* agree
	* strongly agree
2. I am likely to apply what I have learned:
* strongly disagree
* disagree
* neither agree nor disagree
* agree
* strongly agree
1. 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: