CONTINUING PROFESSIONAL EDUCATION TO CONTINUING PROFESSIONAL DEVELOPMENT AND WORKPLACE LEARNING: THE JOURNEY AND BEYOND

Inaugural Elizabeth W. Stone Lecture

Dr Blanche Woolls
San Jose State University
One Washington Square
San Jose, California
bwoolls@slis.sjsu.edu

Abstract

This paper traces the contributions of Elizabeth W. Stone, founder of the Continuing Professional Education Round Table (CPERT), now the Continuing Professional Development and Workplace Learning Section (CPDWL), to continuing professional development for librarians. It follows with a review of the challenges being faced currently, provides considerations for preparing programs at the present time, and offers suggestions for the future. Much of the information presented in this paper derives from the proceedings of the previous five CPERT conferences, with additional material drawn from other relevant literature.

Introduction

Elizabeth W. Stone did not invent continuing professional education (CPE) for librarians, but she certainly was a major force from the 1960s to the present, where, at the Sixth World Conference, this lecture is named in her honor. Dr. Stone’s formal interest in CPE began with her work at The Catholic University of America, and her 1968 dissertation, A Study of Some Factors Related to the Professional Development of Librarians, was the first on the subject in library and information science. She stated her concept of where CPE fits in the professional life of librarians and information scientists in her statement, “education for library and information science should be thought of as a continuum, with pre-professional education, graduate education, and continuing education as a total process, not as separate segments”.

Education for librarians in the United States began with formal, professional education, and this remains the leading interest of the profession. The rapid changes in the information world and in library and information science education increase the need for more learning almost immediately after completing professional education, but this is not always accepted by practitioners. Changing librarian’s perceptions to make them aware of and willing to undertake CPE is a continuing goal.

Two basic concepts of CPE are found in a report published by UNESCO in 1972:

• every individual must be in a position to keep learning throughout his (her) life. The idea of lifelong learning is the keystone of the learning society,
• the new educational ethos makes the individual the creator of his own cultural progress, self-learning, especially assisted self-learning, has irreplaceable value in any educational system.

In order to fulfill these concepts, Stone stated three assumptions:

• the CPE of library, information, media personnel is one of the most important problems facing the profession today,
• there are serious gaps between available knowledge and applications in library, information, and media services,
• continuing library, information, media education is a nationwide problem for which national planning is the best solution.  

Tracing the history of CPE and IFLA helps address this most important problem, moving from a problem to be addressed nation by nation and into an international challenge. This paper then provides evidence from previous research and writing to review and revise our current understanding of CPE, and perhaps to predict future directions and activities. After a brief history, the paper revisits the challenges to successful CPE, and makes some suggestions for the future directions for the Continuing Professional Development and Workplace Learning (CPDWL) Section.

In the beginning

Formal library education, beginning in the late 19th century in the United States, focused on preparing professionals with little attention to their education once placed in a library. In 1923, Williamson’s landmark study, Training for Library Service, had one chapter devoted to the new concept of training that was focused “on the professional improvement of workers while in service.” ‘Training in Service’ suggested the use of correspondence courses and in-service training for professional librarians through summer schools and institutes. While envisioned, this proposed professional improvement did not take shape for decades and little is known about such programs when they did exist. Elizabeth Stone, with Ruth J. Patrick and Barbara Conroy, conducted a National Commission on Library and Information Science (NCLIS) sponsored study to determine whether a central mechanism existed for providing information about CPE programs. One recommendation from this study was a new organization, the Continuing Library Education Network Exchange (CLENE), founded at the American Library Association’s (ALA) 1975 annual meeting. CLENE was an independent national organisation housed at The Catholic University where Stone organized the fund raising activities which allowed the organisation to carry out several institutes and home study courses and to establish criteria for quality programs. Membership did not grow as hoped and funding was problematic, forcing the CLENE Board, hoping staff services at ALA could bring assistance, to petition ALA Council to move CLENE to ALA. This resulted in the establishment of The Continuing Library Education Network and Exchange Round Table (CLENERT). Although Samuel Rothstein, Director of the School of Librarianship of the University of British Columbia, proposed that ALA be the office for CPE in 1965, it was not until 1984 that CLENE made that move. Elizabeth Stone’s idea for a world seminar on CPE began in 1977 at the annual International Federation of Library Associations and Institutions (IFLA) meeting in Brussels, but it was not until 1985 that funding could be secured to hold such a conference. The site chosen was the Moraine Valley Community College outside Chicago, and the dates chosen were immediately before IFLA’s Chicago conference. Stone described the holding of the First World Conference as “a sign of the ‘growth’ in importance of the concept of continuing education in the profession”.

This very successful event produced an eight-point plan of action that was submitted to the IFLA Professional Board. The creation of the Continuing Professional Education Round Table (CPERT) was approved at the Board’s April 1986 meeting, and Elizabeth Stone became the inaugural Chair of the Round Table. CPERT is noted for its timely activities. Program meetings were held at each succeeding IFLA conference beginning with the first in Japan in 1986. At each of the first meetings, a survey was taken of attendees to confirm priorities for the Round Table.
A newsletter was created and mailed to persons who had indicated an interest in CPERT - a list of over 600 persons in 63 countries. Dr. Stone sent update letters reporting the status and activity of the Round Table, and a membership brochure was produced.6

From October 10-14, 1988, CPERT sponsored the first International Symposium on ‘Current Professional Education: Current Issues and Needs’ at the Matica Slovenska, The Slovak National Library in Martin, Czechoslovakia. There were 45 attendees representing eight nations. The conference produced seven resolutions that provided direction for CPERT. The last three of these resolutions addressed CPE needs:

- the use of a wide variety of learning methodologies in CPE sessions,
- the appropriate application of learning theory and adult learning principles to enhance CPE quality and effectiveness,
- research in the field of CPE, especially with regard to the effectiveness of various methodologies developed for adult learners.9

Brooke E. Sheldon chaired a committee which developed a Long Range Plan for CPERT that was approved by the CPERT members during the 1991 IFLA Conference in Moscow and became a part of IFLA’s Medium-Term Programme 1992-1997. The four action plans for achieving the 1992-1997 goals included developing the 2nd World Conference in Barcelona, increasing membership, expanding the newsletter in order to provide an exchange of international staff members, and stimulating research.8

The work of CPERT continued with three very successful pre-conferences following Barcelona: Copenhagen, Chester, VT, and Aberdeen. Papers from each of these conferences were published and presented to participants and all were added to the list of IFLA publications.

As IFLA began to dismantle its round tables, CPERT members, under the leadership of Chair Ann Ritchie, voted to become a section, the Continuing Professional Development and Workplace Learning (CPDWL) Section. The section continues the tradition established by CPERT for offering an excellent continuing education/professional development experience. At our present meeting, one finds some names from the archives of CPERT, but many of the names are new, predicting a bright, but challenging future to fulfil the vision of Elizabeth W. Stone.

Challenges

As information expands, management of and access to this information become even more critical, and require even more training for professional information providers. Smith suggests that human resource development “is a strategic imperative—nationally, organizationally, and individually”.10 If we agree with this, we must acknowledge the challenges well documented in the literature about professional development and workplace learning and seek solutions.

One challenge has been the definition of CPE (see Appendix A.) as distinct from formal education. Darlene Weingand’s presentation at IFLA in Bangkok describes the difference. She places CPE into the professional’s life span beginning with pre-school and ending with continuing personal education or education for personal interests outside the workplace. The coursework leading to the degree is professional education, and she believes the “shelf life of a degree is approximately three years and declining”.11 What happens after the university/college/post-secondary education and degree becomes CPE.

More practical challenges include deciding what, among choices of types and topics, should be offered, who should offer it, how to motivate practitioners to continue their professional development, and which format to use. Some types of CPE gathered from the literature are listed in Appendix B. Discussion here begins with deciding what to offer among
topics. Many surveys reported in the literature were conducted to determine what CPE topics would be most attractive and would reflect the needs of potential participants, and which methods of delivery would be preferred.

Shaheen Majid’s study of CPE in Southeast Asian library and information science schools identified six areas: internet products and services, web page design, knowledge management, design and management of databases, online searching, and records management. These programs were unable to offer these courses because of the unavailability of resource persons or necessary facilities.

According to Ramaiah and Mookth, professionals need help in meeting service management changes, reduced funding levels, introduction of new technologies, anticipating and satisfying the expectations of users, and exploring new possibilities for improving service deliveries. While they did not list new technologies first, it remains a strongly expressed need in most surveys of potential participants.

**Introduction of new technologies**

No one would question the introduction of new technologies as a catalyst for drawing librarians to CPE. Librarians, identified as early adopters of computer technology, successfully applied this technology to library management. This created a new discipline, information science, for the world of libraries and information centers and with it a sense of urgency for librarians in all positions in all types of libraries. A short time later, the advent of the Internet into the public sector generated an even more critical need for librarians to adapt technology applications.

Maxine Rochester and Ken Eustace state that “Internet access gives each librarian a platform for individual expression, opening up new opportunities for professional development and collaboration, notwithstanding the personal development benefits gained by experiencing other perspectives”. Richard J. Smith demonstrated one of the first uses of the Internet for teaching when he posted an announcement on an electronic conference regarding his free workshop beginning August 10, 1992, to be delivered via e-mail over the Internet. “The audience was eclectic, and the need is international. Registrants included those from Canada, Brazil, Hong Kong, Finland, Israel, Taiwan, Singapore, England, Czechoslovakia, Australia, German, Slovakia, Japan, Netherlands, Greece, Norway, Switzerland, and Sweden as well as the U.S.” The packets of information for the three and one half week workshop were mailed to participants to read at their leisure. The large numbers of participants in this early workshop predicted the potential use of the Internet that has grown with the addition of web sites.

In 1998, a library school dean talked with potential employers who expected applicants to show their homepages on the Web. The vital competencies at that time involved “concepts and applications of the Internet; the web and functions such as telnet and FTP; search engines; evaluation of searches; digital library services; and electronic resources”. The fact that telnet is no longer a player highlights the consistent need to update skills. New technology may also demand service management changes, another area of proposed CPE.

**Meeting service management changes**

Service management changes include meeting the challenges of organizational change. Margaret Trask described her experience in creating a not-for-profit company in Australia, AIMA designed “to improve the standard of management in library and information services by providing CPE programs, particularly in management skills for library staff.” Woodsworth found that employers are seeking librarians who are vying for senior management level positions, and librarians able to manage information to improve
decision making across the organisation. The U.S., the perceived lack of professionals who wish to undertake senior management positions dictates a need not only for CPE, but CPE with some marketing devices to make moving up into higher management positions more attractive to possible applicants.

CPE could offer the skills needed to fight the constant budget battles that are difficult under good economic conditions and critical in bad times. Increasingly library and information professionals have to make decisions based on reduced budgets. For many countries, the budget crisis is a constant fight. Typically this challenge is met through programs and workshops that focus on public relations and marketing and those topics draw participants to CPE.

CPE is needed to encourage more librarians to desire higher level positions, a crucial need in the U.S. at least.

**Anticipating and satisfying the expectations of users**

The explosion of technology affects not only library staff but also patrons. Librarians offer new services that are based upon what they identify as being ‘needed’, and also upon the expectations of library and information users. Librarians provide training for patrons, particularly senior citizens, in the use of the Internet. They also select databases their clientele expect to find in the library. Librarians learn the new databases and then help their patrons use them.

Librarians also accept the responsibility for helping patrons become information literate at all ages through basic education, in post secondary education, and as life-long learners. Recent graduates who have no instructional design skills are ill prepared to provide information literacy training.

Librarians must also master updates for software changes as well as new technologies. Keeping ahead of software upgrades and consequent changes in hardware can be challenging, as these changes happen regularly and seemingly instantly. The creation of technologies should be monitored so that they can be adapted and adopted for use in the information community. Today’s librarians must follow in the footsteps of their predecessors who adopted the computer for library management, placing them in the forefront of a new technology. To be effective users, librarians need CPE.

**Who should be offering CPE?**

The choices for offering CPE include institutions employing librarians, government agencies, academic library education programs, commercial vendors, and library and information science associations. Institutions employing librarians need to know their employees are competent and knowledgeable, and they may see themselves as the best providers of the training. However, the adage that an expert is someone who lives more than 50 miles away from the site implies that staff might be more receptive to training with someone other than their colleagues in the role of provider.

Training by experts from governmental agencies, national, regional networks, and state or territory agencies usually means the expert is paid and travel costs may also be borne by that agency. The training is less costly to the library. These persons are knowledgeable about the conditions in the area and can speak from first hand experience with the perceived problems. The Southeast Florida Library and Information Network (SEFLIN) is a large multi-type network conducting training and delivering a curriculum to library staff using three methods, web-based (online) training, dedicated class training (daylong, specific content, held in a member library facility), and voucher class training (vouchers used at a vendor facility).
Many faculty members in academic library education programs gear their instruction to their students who may have little or no knowledge about libraries. The perception of some practitioners that library educators only teach theory rather than practice adds to the concern of these persons providing CPE. A few library education programs are offering CPE. Jana Varlejs highlighted three who offer online courses for CPE in North America, Rutgers, Toronto, and Wisconsin-Madison.19

Commercial vendors come in two forms, those who sell products and those who are full-time CPE providers. Vendors who sell products often provide one or more day’s training in the use of their products with the installation. Other vendors are full-time CPE providers and contract with libraries or groups to train staff.

Library association meetings are regarded as excellent places to find information that will increase the knowledge of those in attendance. In the U.S. many associations offer paid workshops at times other than regularly scheduled conferences to members and other interested participants. The Special Library Association (SLA) offers certification in areas based on their organization’s Core Competencies. Their goal is “to be the only place that you as an SLA member need to go to increase your value as an information professional and to further your career”.20

Regardless of the provider, the challenge is greater for some nations. Africa, as with other less developed countries, “is particularly disadvantaged in the sense that that most of the changes in the library and information profession have occurred outside the continent. The need to keep up with these changes becomes imperative and adopting them to suit local environments is crucial”.21

How to motivate
Jeffrey Alejandro has suggested three questions to be asked before planning CPE programs:

- What professional and personal factors lead individuals to participate in CPE programs?
- Are these factors internal or external?
- How can these factors be helpful in recruiting and retaining CPE participants?22

Before discussing what factors lead persons to participate in CPE, it is best to recognize those factors which make CPE inconvenient and disadvantageous to their participation. Three are travel, time and cost.23 Others include instruction that ignores the norms of behaviour and communication, emotions of participants, feelings of embarrassment.24

To overcome these, Alejandro suggests extrinsic motivators such as financial benefit (bonuses or other monetary rewards) and status (promotions). Further, he mentions certificates and credentials and the awarding of the Continuing Education Unit (CEU). These are discussed in the context of recognition systems.

Distinctions about CPE: quality control and recognition systems.
Recognition systems are definitely an aid to motivating CPE and these systems are tied to a concern for quality control. Quality control in CPE, according to Varlejs25 remains with the provider, and, in the context of professions is usually in terms of credentialing individuals or institutions, an activity that differs from certificates or licensure. Credentialing implies evidence of qualifications rather than a certificate of attendance. Licensure is a legal document. Those are themselves motivators. However, participants are also motivated when they receive recognition for their CPE experience with a CEU, and many questions come with
deciding a CEU. What must be offered to count one unit vs. two units? Who makes the
decision of quality control and who will recognize the awarding of these units? Koltay and
Teglasi echo others when they state;

The official recognition and the quality of the programmes [in Hungary] vary a lot.
Libraries are not in a position to acknowledge CPE efforts; the advancement system is
still run according to the ‘old’ rules and payment increase is not a consequence of
finishing a CPE course. The knowledge and skills are useful for the individuals, but
workplaces are not prepared to utilize and recognize the newly acquired knowledge.26

One recognized provider in the United States, the SLA, offers CEUs to conform to the ten
criteria established by the International Association for Continuing Education and Training
(IACET) and they have been awarded the designation of being an Authorized CEU Sponsor.27

Determining the value of a CPE offering is difficult and part of the solution is to get agencies
to accept the evaluation of anyone other than that particular agency. The sponsor of CPE can
affect the perceived value of the experience.

Preparing CPE programs: which venue, which format?

Darlene Weingand11 listed eight possible forms of CPE: workshops and seminars,
formal courses offered in classrooms, distance education, conferences, tutorials, independent
study and reading, and teaching. If we consider the barriers to participants, these should all be
offered close to the participant, at low cost, and require a ‘reasonable’ investment of time.

Models exist for preparing professional development programs. Joanna M. Burkhardt
et. al suggests that “staging a continuing education program is a learning experience in
itself”.28 Her four stage plan includes planning to plan, dealing with the details, the big day,
and the aftermath. Another model was outlined at the Barcelona conference.29 These models
are more likely to be considered face-to-face instruction, with the easiest being to make
training available close to the individual; that can be taken at convenient times, and that has
the potential to be very low in cost. The Internet potentially fulfills each of these requirements.

Development of CPE courses follows closely on the development of courseware for all types
of education.

Distance education has become an attractive CPE option for librarians. Correspondence courses are always appealing because of their convenience, and the expanded
opportunities afforded by technology add to the potential. “For those who live in rural
communities or can’t take time away from the office, getting online to take professional
development courses is an attractive option”.30 It does require proximity to the appropriate
hardware and, if it is to be interactive, access to adequate telecommunications.

Challenges for the future

CPDWL, as an international association, continues to address CPE in an international
context, recognizing the challenges inherent in this. Jana Varlejs has asked the question about
courses created for an audience in one country, “are they potentially adaptable for use abroad?
Those that deal primarily with technology might be because the terminology and the
technology are fairly universal. Difficulties might arise, however, in the interaction among
students and teachers”.19

Cultural differences may occur at the beginning stages of preparing CPE events.
“Surveying and monitoring the market is not in our culture yet, but it has to be a vital part of
assessing the needs. It is important to focus on both the traditional library sector (public,
school, academic) as well as the non-traditional (profit and non-profit organizations) market
as well”.31 Other cultural differences would be found with a pilot testing. It has also been
suggested that, “the world library community ought to devote attention to educational
products and develop criteria for their evaluation. It can also contribute to the definition of a standard.”

Another method to help others as they begin CPE would be to use the suggestions given for mentoring. Group mentoring and learning pairs have discussed as means of providing for professional development. CPDWL needs to find not only instructors to deliver CPE, but also potential mentors.

Predicting who will want CPE in the future means predicting the future of information agencies. We already know that bookmobiles are being sent to countries where their drivers will go beyond readers advisory to creating books on the spot for their patrons. The ability to do this comes with the digitization of resources. CPDWL must recognize that the development of CPE courses is difficult when faculties or trainers are already too busy or haven’t the resources to work in a digital environment. CPDWL should consider:

- making sure programming for CPDWL sessions at IFLA addresses CPE as learning that occurs after formal education.
- assigning a CPDWL taskforce to create criteria for quality CPE that will take into consideration the global mission of the Section. As an outcome of this, researching the ability to offer a CPDWL certificate within IFLA for the successful completion of CPDWL sponsored CPE experiences,
- choosing one or two topics of utmost importance to a wide variety of potential participants and choose a course, one already developed or one that can be prepared quickly, that meets the criteria established by the taskforce,
- asking members of CPDWL if they would be willing to join as mentors to colleagues who would take our course,
- piloting this course over the IFLA website. The ‘cost’ to the user would be to send a response concerning the usefulness of the course and any expanded use,
- if the course is successful, seeking funding to provide this course as a CD to be sent to sites. The only ‘cost’ would be a report of the use made by the CD and the success of the course,
- continuing to plan and offer longer workshops and conferences preceding the yearly IFLA meetings.

What will be the long term benefits? “Unless pertinent and innovative continuing education programs play a much more important role in the education of librarians, a ghostly apparition will be left to haunt those libraries whose services are not very far removed from today’s”. CPDWL stands alone in the international scene, and each of us must work here and within our own countries to promote CPE. What we do here will follow Betty Stone’s lead. She has left us with a legacy, and the IFLA Continuing Professional Development and Workplace Learning Section can both continue and enhance her legacy here in Oslo.

Appendix A
Definitions of Continuing Education

Continuing library education (in chronological order)

1980: “is a learning process which builds on and updates previously acquired knowledge, skills, and attitudes of the individual. Continuing education comes after the preparatory education necessary for involvement in or with library media services. It is usually self-initiated learning in which individuals assume responsibility for their own development and for fulfilling their need to learn. It is broader than staff development which is usually initiated by an organization for the growth of its own human resources”.
1983: “is anything that helps a person or institution do something better, learn something new, or think about something in a different way”.36

1985: “short formal and information education opportunities to maintain competence and meet professional standards of practice”.37

1986: “consists of all learning activities and efforts, formal and informal, by which individuals seek to upgrade their knowledge, attitudes, competencies, and understanding in their special field of work (or role) in order to (1) deliver quality performance in the work setting, and (2) enrich their library careers”.7

1996: “information education through seminars, conferences, and workshops”.21

1997: “educational activities primarily designed to keep practising librarians and information professionals abreast of their particular domain in the library or information centre, and to provide them with training in new fields”.38

2000: “education that takes place once professional qualification is achieved, with the intent of maintaining competence and/or learning new skills”.11

2002: “is the provision of opportunities for people to continue their learning”.13

2003: “Human Resource Development (HRD), defined broadly, is about developing the work-related capacity of people; people working as individuals, in teams, and in organizations. HRD is about providing people with the knowledge, understanding, skills, and training that enables them to perform effectively. HRD encompasses staff development and training, continuing professional development/continuing professional education, and workplace learning. To be effective, HRD must be an ongoing process of developing knowledge, skills, and capability”.10

2004: “is the systematic method of learning that leads to growth and improvement in professional abilities, enabling individual to function successfully in a changing work environment…. the purpose of continuing professional development CPD activities is to fill in the knowledge gaps between formal education and the needs of the professional practice”.12

Appendix B
Continuing Professional Development: Let Me Count the Ways

Formal
- attending professional library association meetings, conferences
  - professional talks
  - pre- and post-conference tutorials
- working on professional association committees
- preparing a talk for a professional meeting
- writing a paper for publication
- preparing and teaching a course to library professionals and paraprofessionals
- taking a CE workshop or institute that provide new concepts and skills
- taking a formal course
  - short courses
- computer based instruction
- distance education
- seminars
- participate in training sessions provided by employers

Informal
- visiting exhibits at conferences
- reading professional literature
- networking/talking with colleagues
- self-taught: gaining hands-on experience with technologies
- e-mail communications
- Internet-based discussion groups

References
12 Majid, S. Continuing professional development (CPD) activities organized by library and information study programs in Southeast Asia. Journal of Education for Library and Information Science 2004, 45 (1), 64.


23 InFoPeople and California Library Association, California Library Staff Continuing Education Needs Assessment. [unpublished, 2001]. This is but one of many such studies reporting these barriers.


