**TO:** Public Library Association

**FROM:** GMMB

**RE:** Professional Development TOC: Stakeholder Interview Findings

**DATE:** May 30, 2019

From April 29 – May 8, GMMB held 10 45-minute phone interviews with PLA stakeholders with the goal to inform messaging and communications opportunities for PLA’s new Professional Development Theory of Change (TOC). The individuals we spoke with were identified by the PLA team and were chosen given their varying degrees of familiarity with the TOC – were unfamiliar (“new”), had heard some (“interested”), or had been involved in early planning phases of the project (“champion”).

During the interviews we explored how they think about professional development opportunities for themselves and others; shared and gained input on draft TOC messaging; discussed their interpretations of descriptors like “guide” and “tool”; and discussed different ways they’d expect or want to learn about the TOC.

**Overall, reactions to the TOC messaging are positive and the individuals we spoke with are excited to see PLA emphasize professional development in a new way. They have high hopes for the TOC and hope it will be a tangible, actionable tool.** The elevator language gives them a flavor of what to expect, and piques their interest to know more. However, they caution that “theory of change” as a concept may be unfamiliar to most, and sounds more academic than actionable. Further defining the four professional development pathways (so library professionals can better see how each pathway applies to them), and considering a name that feels more actionable, are among the considerations stakeholders suggest.

What follows are key findings from the interviews, and implications for messaging and rollout. We look forward to discussing these ideas with you.

**KEY FINDINGS**

1. **The stakeholders we spoke with highly value professional development, which suggests any resources that share and reinforce this value would be well-received.** They seek a range of professional development – from specifics like best practices, to broader ideas like organizational health and leadership.They take advantage of industry professional development through PLA, ALA and their own library (through HR, etc.). They also seek professional development outside the library (e.g. leadership, organizational health, etc.) that supports broader library strategic goals as well as professional goals and skill development.

Most of the individuals we spoke with are in leadership roles, and tend to think about professional development across their library systems and for staff they manage. For those they manage, they look for opportunities to understand and align professional development with an individual’s career goals or specific skills. For themselves, many seek opportunities outside the traditional library field related to themes like leadership, innovation and overall organizational health/community building (e.g. evaluation, organizational health, best practices in adult programming, best practices in community engagement).

*I look for ways I can engage with like-minded professionals to develop the skills I need ... Methodology, assessment, inquiry and research, community learning, looking at our library practices and other social practices, communication, how does all this come together? How do we present new knowledge? I have started to look for opportunities that are not just lecture based. Experiential, project-based learning. (New*)

*I am a magpie when it comes to [professional development] that. I love to read Fast Company because they tell us how to better manage and support people. I watch PLA stuff, conference stuff, I’m a member of the ALA … Lynda.com I use a lot of the training modules on that. I share articles and things I’ve learned and put things out there on what they [staff] need and are interested in. (Interested)*

*I typically am looking outside the library sphere. How I can develop myself as a service design or human design practitioner. At how I can improve my own management and leadership in working with and supporting my team and being effective with my team across in the library in the upward direction as well. (Champion)*

*I always make three professional goals for myself every year. Based on those goals and my overall career path goal, I’m always looking to, if there are some new skills, I’ll look out for listservs for webinars. We have a professional development department that has access to various materials and professional development classes. Sometimes I do some staff training as it relates to skills and sessions I’ve learned. I depend heavily on internal, and outside it’s going to hands-on workshops and conferences. It depends on what webinars PLA is offering or ALA that I’m a part of ... I lean heavily on webinars because I like to see things visually. (New)*

1. **Most (but not all) stakeholders are familiar with “Theory of Change” as a concept, suggesting some education will be needed.** Seven of the 10 we spoke with were familiar with Theory of Change as a concept. Among those familiar, most were introduced to Theory of Change outside the library context and suggest it’s an idea that may be unfamiliar to library staff more broadly. (Of the seven familiar, three learned about and worked with a TOC outside library context, two were familiar based on things they’d read, and two were familiar because they were involved when the PLA PD TOC was being developed.)

***I’m familiar through nonprofit organizations I’m involved with****. One with a Latino community foundation. We require TOC for that and then a couple other nonprofits that have TOC. That’s where my first involvement of TOC came from. Not from the library side. (Interested)*

*My previous experience was with an international development foundation and we had funding from Gates Foundation and TOC was something we worked with often.* ***It comes up less often with the library community honestly.*** *(Champion*)

*In a project I was working on a year ago, a TOC would encourage collaboration with different partners and was a good way to introduce your concept to partners at different times...We began looking at it in our library and aren’t quite there yet, but a year and a half or so ago, I created one.* ***It’s not common knowledge across the whole organization, we are still learning.*** *I’m going to go out on a limb and say the concept of TOC is not understood across the organization. (New)*

1. **First impressions of the PLA Professional Development Theory of Change elevator language are positive – the tone is empowering, and stakeholders are excited to see PLA emphasize professional development in a new way.** Many mentioned their library system’s own strategic plans and are already thinking about skills needed to advance public libraries and put these (or similar) values into practice. Those familiar with the PLA TOC find the draft description clear and it piques their interest. Upon first read of the elevator language, all want to know more about what it is and how they can use it. (See page 8 for the draft elevator we shared.)

*It’s positive on the point of its focus on professional development and that* ***PLA wants to take a leadership role*** *in that regard. (Interested)*

***The tone is right.*** *It starts with the premise that public libraries constantly evolve and acknowledges the fact that change is a constant and professional development grows and changes too. I like that.* ***The wording is incredibly empowering.*** *(Champion)*

***It’s inspiring and it gets to the heart of what PLA wants to do.*** *It focuses on the reality of the change that has happened in the libraries and the need for libraries to be advanced connectors and innovators. (Interested)*

*Certainly positive. It all makes sense****. I would want to know and would be interested in how I can use this Theory of Change.*** *(New)*

1. **Upon reading the description, they want to know more about what “it” really is.** The ideas in the elevator language generate interest, but what it is and how it can be used are unclear.

*I love the writeup. I’m not clear though if I hadn’t seen a PDF, if I’d have known what the TOC is. The writeup doesn’t tell me what the TOC actually is.* ***It’s interesting, but what is it?*** *I think it’s exciting and it makes me think, I want to do that! It’s great. (New)*

***The thing I would want is a tangible grab-on for what these things mean and how they apply****. I wouldn’t put it in this statement but in supporting documentation. It looks like this: bullet, bullet, bullet. (New)*

1. **The four pathways align with values leaders have and think about for libraries, but they need more definition.** Stakeholders want to understand how PLA defines each of the four pathways – for example, what it means to be a “networked innovator” or “data-driven leader” – so library professionals can better see how each pathway applies to them.More description or definition along with examples will make them more clear, relevant and meaningful.

*Yes, we need all of these. I also feel you can show how each of these are integrated …* ***But what does PLA mean when they say we are innovators? What do you mean by data-driven leaders?*** *What are the tools I need for that? Are you talking about project-driven outcomes? Librarians seem to be very literal thinkers. (New)*

*I would also want to know more about some of the language. Like “innovation”, we use that word a lot but we don’t define what that looks like. There’s power in that word if we know what it means. But it’s used so much that it loses its meaning.* ***What does PLA mean when they say we are innovators?*** *(Interested)*

***When you say community advocate, does it mean you’re advocating for the community?*** *When I read it before I thought it meant I’m a library advocate. (New)*

***Stewards of the public library is … I don’t know.*** *I think networked innovators is important, but I’m not sure about that language. What does that mean, networked innovators? (New)*

1. **In describing the TOC, “guide” suggests a path to follow, with actionable steps. “Tool” suggests something to use how and when you want.** When discussing how to talk about the TOC, both “guide” and “tool” have positive meaning and set certain expectations. As a “guide”, stakeholders expect the Theory of Change would allow them to see where they are, understand the steps to take, and chart their own path forward. “Tool” suggests something that can be applied in whatever way the user wants, however it works for them. “Guide” feels like the most appropriate descriptor for the TOC in its current form.

*[Tool vs. guide?] They are two distinct things.* ***Tools are something I can use how and when I want and guides are more prescriptive in having a set path to how they’re used*** *… People love a guide. Librarians are very black and white and they love a guide and they like it to be step by step … They would expect steps and direction from a guide. (Interested)*

***I think guide is fine because it’s a pathway*** *and you can say it’s used to chart their own path ahead. Framework implies more of an outline, but it’s static.* ***I think guide has a little more action****. It guides you, could be verb or noun. (Interested)*

***I expect something where for the different areas in the TOC, I could have a path towards building understanding or expertise in that area.*** *I would imagine that it would have steps that could be taken, reading for different experiences for growing into mastery. (Champion)*

1. **They are hoping for something practical and flexible that they can use and come back to.** Whether it’s a clear visual reference or a tool to engage with and track progress, stakeholders (especially front-line) expect something they can readily apply and use.

***What they [smaller libraries] are looking for is less about theory, but more practical system tricks and tools*** *… I’m not as interested in the actual theory, but what do I do when this happens? What’s practical? (New)*

***I would hope that it would be interactive and I can engage.*** *We are busy and I don’t have time to read really. I just wouldn’t want some manual. I would want something that could track and save my progress. Log in when I can. Utilize it and see where I’m at. Set goals, both long and short term. If I have one bigger goal to become a data-driven leader, I would want to have these several smaller things to get me there. I know strongly how to use data, how to collect it, have all the tools for data collection, know all the research methods, how to compile the data. Becoming efficient in those areas to be able to check, check, check. People need that. (New)*

***That it’s flexible.*** *Not a one-size-fits-all program. That it’s a framework and would be used wholesale, but also modified to fit the needs of particular libraries. (Champion)*

*That there’s documentation I can go to. Is there a PDF I can download and read through? Is it a series of professional development opportunities?* ***I would want something to be able to read through, return to, and look at****. (New)*

1. **Some question whether the TOC is meant for everyone or just MLS staff, suggesting that defining the TOC as a tool for “library professionals in every role” may be useful.** The idea of Theory of Change in itself feels aspirational and academic, which may not connect with how everyone thinks about their job and role. In particular, some sense that front-line staff may not see themselves or how their day-to-day role connects with the current pathway language.

*I have a question, is this for professional staff only?* ***It feels like it’s only for the professional staff, not para-professionals****. It doesn’t feel like it’s inclusive. It feels like some people are excluded or on the margins of this. I think it goes back to the language used. (New)*

*It makes me wonder who it’s written for.* ***Is it for line staff who are interested in more professional development for themselves or for directors to sell to their people?*** *... The word “library professional”, line staff wouldn’t think it was for them. People in circulation. Library staff might be better? Would it isolate people higher up? It wouldn’t isolate me. (Interested)*

*I recently submitted a [PLA 2020 Conference] proposal. They started using this pathways language that I hadn’t seen before. When asked which track does your proposal align with and using those terms it was really hard for me to … well, I’m a librarian so I see advocate as slightly different than being a professional.* ***It was a challenge to me to see myself in one of those areas. The words sound nice, but when I was trying to put myself in one track, I think it would need a bit more explanation.*** *(New)*

1. **“Professional Development Theory of Change” sounds *academic*, not *actionable*.** For busy professionals looking for tangible tools, “theory” doesn’t sound like something that can be immediately applied. While they understand the purpose of having a Theory of Change – as a rationale and strategy to achieve specific outcomes – the name itself isn’t sticky enough to grab attention and it runs the risk of being overlooked or deemed “not for me”.

*I don’t love it. It feels so academic. TOC is obtuse. TOC doesn’t have enough action in my mind. It feels research-y and it tells you how your brain evolves.* ***I would love it to be more call to action****. (Champion)*

*I know why you have to call it that, but it’s long and not sticky enough.* ***It’s overly scholarly and could lose small and mid-range libraries****. (New)*

*I’m not sure that is helpful. It sounds very academic.* ***We try to think of learning as fun and exciting, and here it doesn’t [sound that way].*** *(Champion)*

*I’m thinking about when I was first introduced to the TOC and it was mind boggling and difficult. When you introduce TOC,* ***it sounds very theoretical and some libraries won’t latch onto that. Cut to the chase, what does this mean?*** *(Interested)*

***If I see “Professional Development Theory of Change”, I will look the other way…*** *As a busy professional, I saw this, I would see it and say what in the heck is that? ... If it’s something I’m not interested in, I will tune out. You have a couple seconds to capture my attention.” (New)*

1. **Stakeholders expect this would be a significant and enduring endeavor for PLA.** As such they imagine supporting materials and consistent communications.

*We are used to PLA embarking on these big campaigns they push forward* ***and I’d love for them to have sustaining value as a PLA initiative****. (Champion)*

***Is PLA doing this full scale? How long will this last?*** *Is it sustainable? If you start something, how long is this initiative lasting for? Are there assessments that could be taken? How will you get this out to the masses? (New)*

1. **Those who have seen the visual document emphasize that the TOC is complicated and requires communications and champions to support it.** On its own, the material requires several reads to understand. In addition to an explanation to support it (whether video, conference sessions, 101 explainer, examples of how it’s working in other libraries), building champions who are familiar and take the ideas back to others in their libraries is considered essential.

*I think you’ve done a good job on the narrative in terms of the communication piece.* ***What I may suggest is that PLA is careful to not just throw the TOC out there because it would just mind-boggle people. It took me several reads to get it, color coding, layers, it’s robust.*** *For folks to grasp that, they would have to understand TOC already or it takes some thought. Maybe an intermediary piece that could simplify and say “this is what we are trying to do and here’s how we get to it”. As it is, the TOC is going to be complicated for folks. (Interested)*

***These are valuable concepts to introduce but will take explanation****. Maybe offer, if you aren’t familiar with the idea of TOC, here’s a quick 101 or something you can read. The reason we frame it this way is because X. It would be helpful for people to read. (Champion)*

*What I have learned is I can go and talk about theories, but I have to show how it looks in my library.* ***I think a lot of libraries will want to see “this is how this idea looks here****”. (New)*

*I’d like to see this developed in the library leaders not just at the top, but the middle as well****. Those advocates who can explain this and be champions of it and use it as a resource and a tool****, so we can all win would be effective in my opinion. (New)*

**IMPLICATIONS**

As it currently stands, the elevator language drives interest. People quickly go from “sounds good” to “what is it exactly and how can I use it?” Based on what we heard, below are considerations for messaging and rollout:

* **Provide context as to the “what” and “why” of Theories of Change.** Consider an intermediate piece/content that explains what a TOC is and how they are useful tools for organizations. Also, an FAQ that can be updated as the TOC evolves.
* **Define the four pathways in talking points and explanatory materials**. A simple descriptor will go a long way in making the ideas concrete and helping people see how each pathway is relevant to them personally.
* **Provide examples of what the pathways look like in action**. E.g. What are other libraries doing to become networked innovators? What does that look like?
* **Consider a less academic name for when this PD initiative rolls out**; the TOC should remain as part of the background and strategy.
* **Consider a phased communications plan that allows PLA to introduce the thinking behind and purpose of the TOC, while gaining further input to co-create and build out the “what”.** For example:   
  + Phase One
    - Introduce the thinking and “why” behind the TOC
    - Share how PLA PD offerings will begin to align with/highlight the pathways
    - Be transparent about the “work in progress”
    - Gain input on and co-create the “what”
  + Phase Two
    - Brand the TOC (e.g. new name, look & feel) prior to official launch (see below)
    - Pilot the TOC in different size libraries to test the proof of concept and capture learnings
    - Conduct outreach to other library information and training sources (e.g. Urban Library Council, COSLA, WebJunction) to talk about PLA’s TOC and explore opportunities for information sharing and training
    - Prepare new PLA training offerings
    - Determine how the PLA website will be used to support the TOC
  + Phase Three
    - Develop a specific roll out strategy to library directors in advance of the PLA 2020 Conference so they are aware of it and how it works – initial communication with background and goals; series of conference calls and/or webinars to explain how it can be used (at the library systems level, the library level, personally and for library staff) and answer questions; tap Director-level champions in this effort
    - Create an official roll out the TOC at the PLA 2020 Conference – teasers prior to conference; announcement at conference to generate excitement plus related sessions to show how it can be applied and what was learned through the pilots (e.g. a learning session for each library role), including a Train the Trainer style session so people can explain how to use it when they return to their libraries; a preview of what to expect the rest of 2020 (e.g. monthly webinars, new PLA trainings introduced, regular tips and examples of the TOC in use shared via PLA communication channels).

**APPENDIX**

**Draft Elevator Language**

As public libraries constantly evolve – from information providers into critical centers of learning, creativity, and community development – so do the roles of library professionals. Today’s library professionals are not only experts in their field, they are advocates, connectors and innovators. And they need professional development pathways that support their growth in all of these areas.

That’s why we’ve developed *The Professional Development Theory of Change*. It’s a guide library professionals can use to chart their own path toward becoming data-driven leaders, community advocates, stewards of the public library and its values, and networked innovators. The Theory of Change helps library professionals identify professional growth opportunities aligned with these critical roles, recognize and build upon the competencies and skills needed to support them, and see how their own professional development links to important outcomes in their library work and the library’s impact in the community.

Professional development is at the heart of what we do at PLA. The Theory of Change rethinks the how the public library field can approach – and PLA can support – professional development. We’re excited to introduce this new way of thinking about professional development later this year. If you are interested in learning more, please visit XXX.

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