



## Education and Training for Library Management

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**Column Editor's Note.** *This JLA column will consider issues of education and training for management positions in libraries and other information organizations from the perspectives of both the provider and the recipient. The column will appear in odd-numbered issues of the journal and focus on management education/training at various stages of the individual's career including the effectiveness of these efforts, their content, and the specific challenges of teaching and learning within the field of librarianship. The column will address both theoretical and practical concerns. Prospective authors are invited to submit articles for this column to the editor at [aa3805@wayne.edu](mailto:aa3805@wayne.edu)*

### DEVELOPING PERSONAL COURSE PLANS (PCPS) AS AN EXAMPLE OF SELF-DIRECTED LEARNING IN LIBRARY MANAGEMENT AND PROJECT MANAGEMENT EDUCATION

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**ABSTRACT.** *This article examines the education of library (MLS) graduate students in courses of library management or in special topic courses in project management in libraries and information centers. To examine the specific skill of project management, a method was employed allowing students to set deadlines as*

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*a form of self-directed learning. The student-created syllabi milestones were piloted to search for a match between student abilities and development of project management processes upon degree completion. The use of a proposed and piloted technique was implemented here through a tool named the Personal Course Plan (PCP). It was designed to assist students in learning the value of setting personal schedules for their enrolled graduate course, much as a library project manager would use in practice in libraries. Personal Course Plans (PCPs) were effectively developed by students and allowed the ability to self-monitor their performance on completing project deliverables, meeting expectations of supervisors, and judging their own performance. As the experience was a positive one for both the instructor and students, this article provides not only an operational examination, but also proposes theoretical justification for using such a teaching method in library and information science education. Described are details LIS faculty should consider in implementing the method in teaching and gives future library employers of LIS program graduates a sense of what project management skills recent graduates are receiving.*

**KEYWORDS** *project management, library education, management, teaching strategies, self-directed learning*

## INTRODUCTION

In looking at my teaching of management and project management courses at the Pratt Institute and Emporia State University, I wanted to examine more effective ways of delivering project management skill theory, while deploying a way to develop project management skills in a self-directed learning activity. In a course full of operational theory, project management seemed the right choice to test the process of letting students set their own deadlines in the course.

Therefore, the scope of my work to develop this teaching strategy as a project assignment is examining the importance of an activity that assists students to understand the value of setting project schedules for their enrolled graduate course, much as a library project manager would do in practice in libraries. As assigned, the students plans were developed to allow students to: (1) self-monitor their performance on completing project deliverables, (2) meet expectations of supervisors (*faculty vs. library employers*), and (3) judge (and reflect upon) their own performance.

## Conceptual Framework of Self-Directed Learning: New Ideas for LIS Education

This experiment is grounded in the work of self-directed learning expert, Malcolm Knowles (1975). Self-directed learning begins with the “process in which individuals take the initiative, with or without the help of others” (Knowles, 1975). Self-direction can take many forms, but a descriptive model lets the student control the decision-making about the objectives and means for learning (Mocker & Spear, 1982).

Beyond this definition, informal learning can take place when institutions (faculty) control the objectives and learners can control the means of the learning. The Personal Course Plan (PCP) experience fits well in this informal learning example. Given this method, students are given a homework assignment that produces both a percentage of their grade and also plots the course for them in measurable, self-directed, and realistic ways. The student is given the choice, for example, whether or not to have their spring break homework-free or if it is a class-free week when they can have time to catch-up on readings and complete assignments. Given the parameters of self-monitoring and direction, the course is implied to be more conducive to actively learning project management skills than with instructor-designed deadlines.

Self-directed learning is an excellent way to teach operationalized project management skills to graduate students. Project management tools such as Gantt charting and Work Breakdown Structure (WBS) can be quickly applied to real-life (and real-library) scenarios such as planning summer reading, designing and developing a makerspace, or teaching Spanish to front-line reference librarians to increase service capacity. Library educators are here challenged to create curriculum activities, such as a student-created PCP where students can set project deadlines, milestones, and completion dates. Having these transferable skills when students leave our programs will allow them to better manage their future projects, such as LSTA and IMLS grants, creating digital applications of local history collections, and setting plans for newly, integrated automated library systems and web projects.

The goal of this strategy is not just to allow the students to hear the theory of management science but to take these concepts, understand them, and develop them as future library managers who will need to apply them in real-world project management. Essential to the success of any teaching activity is the ability for students to see the connection between their homework assignments and the purpose of learning the skill beyond a course.

Active, self-directed learning can be applied to LIS education by giving students “real life” scenarios from which to learn. Kloppenborg & Baucus (2004) give adaptable objectives for self-directed learning as an example in project management education. These same approaches can be tied to library graduate students’ projects and course assignments, not to mention

developing in students a skill they can use to keep library projects and library committees of all types on project targets and project timelines.

### An Application of the Teaching Method: Development of the Personal Course Plans (PCPs)

Using this teaching method of allowing self-directed learning by having students create their PCPs is perhaps, the most direct way for MLS students to mirror the behaviors of practicing librarian/project managers. During initial course sessions of a class, the students were informed they would be creating a PCP. The document was explained as: “The PCP is a one-page document that will guide you to meet your personal goals, as well as keeping you on a timeline to be productive in the course. A sample will be developed in the first session.” During the session, students were instructed to create a short list of all the activities they would need to complete, to deliver projects to the instructor during the course. Students were given the opportunity to self-direct how they would approach a project, how much detail they would include, and what the document would look like. The introductory, project management content lecture was intentionally given after the PCPs were designed so as to release the students from creating a more difficult visual representation than needed for the purposes of their coursework.

As a primer on the standard four types of project management charts, the students could have created from the usual types and often did (see Table 1). From WBS and Gantt Charts, adding visual implications of task complexity, interdependence of activities, and consequences of not moving

**TABLE 1** Four common examples of project management charting.

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**Gantt Chart:** A bar chart based on an x-axis timeline to indicate task start and end times, commonly combined with a y-axis chronological list of tasks. A good visual of charting graphical representation of the duration of tasks against the progression of time, especially when some tasks span months or years and some do not.

**Program Evaluation and Review Technique (PERT):** A version of the Critical Path Method (CPM) where task timing is directly assigned a probability of completion. Additionally, the PERT chart assigns when to do a task and its calendar date (beginning and ending). Often the horizontal axis has time in months and the vertical axis shows who will be doing the work.

**Critical Path Method (CPM):** The series of tasks that must be completed on time for the project to be completed satisfactorily, focuses heavily on modeling, decisions, and tasks.

**Work Breakdown Structure (WBS):** A hierarchical breakdown of a project into successive levels. Each level usually contains more detail and who may be involved in each activity.

Developed from Kelly (2005) and NetMBA (2002–2005). For visual examples, refer to: NetMBA available at: <http://www.netmba.com/operations> and for Gantt Charts, <http://ganttchart.com>.

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**TABLE 2** Sample #1: Student designed personal course plan (PCP).

Student Activity: Student A	Deadline
Select book for course case study	February 1
Meet with instructor to review paper milestones	February 14
Schedule interview for <i>Compare and Contrast Management paper</i>	February, month end
Conduct interview, write up notes, and write paper	March 1
Submit first paper: <i>Compare and Contrast Management</i>	March 15
Read book for course case study	April 2005
Write course case study	April 1

**TABLE 3** Sample #2: Student designed personal course plan (PCP).

Course Activities: Student B	Deadline
Design a PCP for class	Month start
Select a book for case studies	Month mid-point
Start thinking about which two people to be interviewed for the Management paper	Month end
Finish reading the book, work, and review the questions. Complete readings in syllabus (Chapter 2 and beyond)	2nd Month start
Start working on the Literature review paper. Set up interview with the two people for the Management paper; start reading my case studies book	2nd Month mid-point
Continue working on the Literature review paper. Continue reading the case studies book	2nd Month end
Start the class reading assignment (Evans chapters)	
Continue reading my case studies book	
Start interviewing the two people for the Management paper. Start the class reading assignment (Evans chapter)	3rd Month start
Start working on the Management paper	3rd Month mid-point
Finish up the Literature review paper	
Start the class reading assignment (Evans chapter). Continue reading my case studies book	
Continue working on the Management paper	3rd Month mid-point
Continue reading my case studies book	
Finish up the Management paper	Milestone "check status" hold
Start the class reading assignment (Evans chapters)	
Continue reading my case studies book	
Finish reading the case studies book	3rd Month end
Start working on the case studies paper	4th Month start
Start the class reading assignment (Evans chapters)	
Continue working on the case studies paper	4th Month mid-point
Finish up the case studies paper.	4th Month "check status" hold
Start working and practice on the outline of the teaching session	
Finish up on the outline of the teaching session	4th Month end

**TABLE 4** Assignment list from course syllabus demonstrating student choices using Personal Course Plan (PCP).

Sample assignments	Due date	Grade percentage
Brainstorming session	January 24	Pass/Fail
Professional biography	January 31	10% (points)
Case book selection and Personal Course Plans (PCP)	February 7	10% (points)
Four questions related to work (Halberstam)	February 14	5% (points)
Topical paper one: Management paper	<i>Student designated PCP</i>	15% (points)
Topical paper two: Literature review	<i>Student designated PCP</i>	15% (points)
Final written case studies	April 25	25% (points)
Class teaching experiences	April 25, May 2 and 9	20% (points)

forward with tasks due to other delays are all important elements to teach in LIS courses using this method.

### Student Examples: Models of the Personal Course Plans (PCPs)

During most sections of the courses deploying this teaching method, students created a version of a WBS, which worked effectively for this pilot test. Often, students used elements of Gantt charts with a WBS, and students commonly create their PCP including work deadlines for all of their enrolled courses.

To underscore the validity of thinking visually using WBS, I structured the required milestones of the course through the same approach in the syllabus (see [Table 4](#)).

### Analysis and Findings: Initial Evidence of Success Factors and Student Feedback

It was beyond the purpose of this effort to conduct a pre-test/post-test analysis of developed project management skills, or to measure which students met all of their PCP milestones. Some deadlines were affected by library manager availability or things beyond the control of students. As an example, students planned to meet a librarian for *Interviewing a Librarian* paper but did not add into their calendar the chance that the meeting may not happen on the day scheduled. These changes often pushed the students to future dates far beyond their original plans. Even this became a welcome byproduct of the effort of self-scheduling as it gave students, especially those not working in libraries, an inside look into the usual complexity of a librarian's daily schedule. Students often had difficulty in mapping out the timing

of assignments that included other people. In fact, given that the homework assignment, "Compare and Contrasting Library Managers," may have caused the problem, students learned a valuable lesson in project management, the interconnectivity of other's work to one's own work product.

Predominately, the reasoning behind an edited or newly submitted PCP was usually due to practitioners in the field canceling the scheduled appointments with students. This pushed back the interviews and therefore completion of the student paper.

Evidence is found through representative, post-course correspondences:

- "I wanted to send you a note regarding my Personal Course Plan (PCP). Not only was it a great idea for the course, it forced me to be more organized, and I will use this structure of keeping myself on-track in my classes from now on."
- "It (the PCP) helped us to start thinking about the projects and what we wanted to do to accomplish them."
- "I feel the assignment of working with librarians acting in project management roles was incredibly valuable. The ability of working with a librarian, finding how challenging it was to find a time to meet and work with their team, gave me a real sense of working in a library, project-team."
- "I look forward to getting into management and using these skills."
- "The PCP kept me on track throughout the semester ... holding me to guidelines that were something I came up with and stuck to."

### What is Changing about Project Management in Libraries?

The application of online, project management tools helped in developing student skills in a substantial way while using this PCP model. Currently, students are assigned to use three online schedulers: (1) Remember the milk, (2) Todoist, or (3) Trello. Each is a flexible planning tool, which is customizable and user-friendly. Recent students have not only been committed to the evaluation and application of the tools as assigned, they have implemented them far beyond the initial requirements, including all of the deadlines and project needs for their other courses. Several students have mapped out other aspects of their lives into these tools to manage their deadlines. With this deep commitment to the practice of scheduling and process, we can only predict more project-focused librarians in the workplace in the future.

### SUMMARY, CONCLUSION, AND FUTURE THOUGHTS

Looking at the process of active or self-directed learning, using this procedure of students working on their own deadlines and course plans may be

one method that justifies further exploration. Through this experience, the students were engaged; and, at a mid-semester survey, over half of the class participants named the ability to set their own deadlines as a key enhancement to their skills. It is clear from looking at the student examples and comparing them with the four classic visual plans for project management that library educators should consider looking at course plans as a way to teach project management skills. The majority of students seemed to prefer the self-monitoring process for their homework projects.

This method was used to teach students to develop the skill of staying abreast of project planning to control their own workflow and to see the interconnectivity of their work as related to that of others. These are key principles to know in libraries and information centers today, where we are not working in a vacuum with only our own productivity to be mindful of. Students appreciated the ability to have some control over their own project destiny and schedule by managing the semester's project work. My assumption is that graduate students should be both able and expected to develop a project management timeline upon completion of a management course, which will allow them to work on these skills much earlier in their career. All of these strategies will make our libraries all the more productive once students bring these skills to the library workplace.

In many ways, LIS education is going through a revolution with online education. Students are forcing us to teach applicable skills that assist them in developing relevant strategies and tools to commence a productive career.

As suggestions for implementation, should LIS faculty wish to integrate the PCP in their courses, they may consider allowing students to develop their PCPs when:

- The course topic is a mix of both theory and practice without constant faculty intervention. The PCP might not be the best choice for reference courses; but, in advanced or topical reference courses, such as Health Information Services, Government Documents, Web Design, or Social Science Reference, where the timing of the graded activities can be student-selected, directed, and controlled, PCPs could be successfully evaluated without delaying the student's next steps in their plan. By contrast, an introductory course on the Organization of Information may not be the best place for the PCP, but an Information System or Informatics Course where the student could select some of the major milestones would hold much promise for the success of this teaching tool.
- The course is heavy on reading that does not directly tie to each lecture. If students have a few weeks to complete entire books or substantial chapters in readings, the PCP will allow the student to set more realistic measured goals for completing the course reading.
- The course allows for a fostering of relationships between the student and practitioners in the field. As with several courses in LIS education, my courses employed interviews with library project managers to get their



insights on project work. This was an example of a project where the PCP could document several milestones, such as when the calls to schedule the interview had to be made, when the interview happened, any follow-up, writing the report, and submitting it. It was an excellent lesson to show students visually that projects are not just task X and task Y; there were several steps to success in writing the paper; and the librarian's schedule was a major influence on whether the paper was completed on time. Having students learn through this exercise that workflow in libraries is an organic, systemic process was one of the key goals of this course and one that most students accomplished with the help of the PCP.

- The course allows for fostering relationships among other students. Peer-education in LIS education is a common teaching strategy, one that may be enhanced by using a PCP to chart that collaboration in class. While some groups seem to have several bumps and starts along the road to completion, a course that employs both a PCP and a group project would allow not only some clear milestones and deliverables but would ensure that everyone in the group process was equally sharing the work. This could be visually documented in charts. After each activity, name the student in charge of it; and then each student feels he/she has an activity equal to the others. The challenge with these assignment choices is that students must agree at the initial stages of their work together who is responsible for which elements of the assignment and realize their individual grade may be a part of another student letting the group down. One teaching strategy to introduce here is to teach to the commitment of group development using Tuckman's model, known as forming-storming-norming-performing (Tuckman, 1965). Once there is commitment to this process of working together, students often work to their combined performance.
- Students homework assignments can be captured and measured by activities. Students predominately documented their milestone activities as paper completions, the librarian interviews, readings, etc. rather than documenting more informal situations, such as a consultation with faculty for further clarification or assistance. This factor is likely due to the impromptu nature of such interactions. Faculty may wish to be clear whether or not they would like any revisions to the PCPs to be resubmitted with changes in dates. My approach did allow students to update their plans only when major activities had changed focus.

Wherever created, the PCP technique demands some attention from the faculty. I suggest this is another example where we are working together in constant learning as an active and engaged pursuit. By not only sharing your knowledge with your students, but by engaging students to become involved

in calendarizing their own success throughout a course, our profession will create more empowered, self-directed thinkers, and librarians.

Further research should be conducted to examine the productivity found here in developed project management skills, as well as productive schedule keeping, deadline creation, and completion. Future studies could compare relationships and experiences between students in a control group that would not self-direct and one that would. With such research, we would have more definitive evidence as to the presumption of effectiveness of this teaching method.

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