BACKGROUND

In 2005, Texas Library Association (“TLA”) President Gretchen Hoffmann introduced a leadership initiative to address critical issues in three areas of librarianship. She appointed Julie Todaro to chair the New Initiatives Task Force (“NITF”) and create a structure for addressing the critical issues. Under the auspices of the NITF, three separate task forces were defined. They included:

• Task Force on External Library Relationships
• Task Force on Media Relations
• Task Force on Professionalism in Library and Information Science Education (“Professionalism Task Force”)

This report describes the deliberations of and recommendations developed by members of the Professionalism Task Force. Julie Todaro, in her role as Chair of the NITF, participated in the activities of the Professionalism Task Force, which was chaired by Bonnie Juergens. A complete roster of Task Force members is included as Exhibit I.

TASK FORCE CHARGE

The formal charge to the Professionalism Task Force, as amended and finalized in 2006, includes the following purpose and products:

PURPOSE:
To identify key elements of professional ethics, advocacy, and leadership necessary for the development of library and information science professionals*, and to suggest ways the Texas Library Association can assist continuing* and graduate education providers to make such content available to practitioners

PRODUCTS:
• Desired competencies and skill sets for library and information science professionals in the areas of professional ethics, advocacy, and leadership
• Information about educational preparedness of recent graduates from Texas library schools in the areas of professional ethics, advocacy, and leadership
• Recommended content and learning outcomes for continuing and graduate education in the areas of professional ethics, advocacy, and leadership
• Recommended strategies for integrating professional ethics, advocacy, and leadership learning opportunities into continuing and graduate library and information science education

* The term “professionals” as used herein refers to all library workers with the responsibility to represent and apply the values defined by the profession. Only when it is preceded by “degreed” is the term “professional” intended to refer to library workers with formal library and information science degrees (“degreed professional”). Likewise, “continuing education” is intended to refer to work-related learning for library workers of all ranks and educational status, not only to work-related learning for degreed professionals.
Hoffmann described the charge to the Task Force in the context of her desire to “…bring together leadership individuals from TLA and the schools and organizations that educate library workers in the state of Texas, and have this set of leaders provide guidance to newcomers to librarianship as well as workers in the field about how they might gain knowledge and set personal expectations concerning professional ethics, advocacy, and leadership.”

**TASK FORCE ACTIVITIES AND DELIVERABLES**

Members of the TLA Professionalism Task Force recognize that curriculum development is entirely the domain of the faculty in institutions of learning. Task Force members respect the right and responsibility of faculty to define the content and delivery characteristics of all their professional school’s coursework. In this context, the Professionalism Task Force determined the requirements of their Charge allow for suggestions concerning the competencies needed in libraries and recommendations about the assistance TLA might be able to provide to educators. The strong participation on the Task Force of all five deans/directors of Texas graduate library schools kept members of the Task Force focused on their role of providing assistance rather than attempting in any way to impose external control over the shaping of curricula.

To accomplish the “Purpose” and create the “Products” of the Task Force charge, the Task Force defined for itself the following tasks:

- **Conduct research** to address both Purpose and the second Product. See Exhibits II and V.
- **Create a chart** to contain the first and third Products. See Exhibit II. Please note that “core competencies” included in the chart are limited to the Task Force’s focus on professional ethics, advocacy, and leadership. Thus this chart does not include a number of very important additional professional competencies such as the organization of information, specific technologies, reference skills, etc. Perhaps future TLA effort will develop similar “competencies” discussions and tools in other key areas of librarianship.
- **Create a list** to contain the fourth Product. See Exhibit III.
- **Prepare recommendations** to fulfill the Purpose of suggesting “…ways the Texas Library Association can assist continuing and graduate education providers to make such content available to practitioners”.

Task Force members discussed the following perceptions which influenced the recommendations in this report. TLA’s goal, and the goal of continuing and professional educators relating to professional ethics, is to introduce information about and/or provide reinforcement of professional standards and ethical behaviors for library workers. For library workers who have not had any introduction to the ethics of being a professional librarian, the provision of training, workshops, and discussion opportunities is critical to the development of professional, ethical librarianship. For degreed professionals, knowledge about professional ethics, advocacy, and leadership is obtained in professional education programs and reinforced in the form of daily practice and new learning throughout one’s career. Professional associations such as TLA constitute key sources of information and discussion opportunities on these critical topics throughout the professional life of library workers. Collaborative efforts undertaken by members of TLA to enhance the offerings of continuing and professional education providers outside of TLA should result in pervasively available opportunities for all Texas library workers to strengthen personal skills in these key areas. The outcome should be enhanced library services for all Texans.

During late 2005 and early 2006, research assignments were undertaken by members of the Task Force (see Exhibit I: *Roster* and Exhibit IV: *Findings of Research on the Content and Delivery Characteristics of Education about Professional Ethics, Advocacy, and Leadership for Library
Workers). Based upon the information gleaned in this research, the Task Force determined TLA can play a very productive role in assisting continuing and graduate education providers to make content about professionalism available to library workers.

Methods for providing such assistance include, but should not be limited to:

**Recommendation 1:** Facilitate broad dissemination of the Core Competencies and Learning Outcomes Chart developed by the TLA Professionalism Task Force. This chart (Exhibit II) itemizes competencies and learning outcomes. The accompanying list (Exhibit III) provides suggested instructional strategies, activities, and techniques for delivering the content. Information in the chart and strategies list is applicable to both graduate professional education programs and continuing education programs throughout the state.

**Recommendation 2:** Establish a mechanism for updating the Core Competencies and Learning Outcomes Chart and evolving the ways the Association can assist professional and continuing education providers to meet the unfolding challenges associated with providing education about professional ethics, advocacy, and leadership.

**Recommendation 3:** Support and encourage inclusion of professionalism topics in teaching programs at the graduate level and continuing education level throughout the state.

**Recommendation 4:** Work with library educators to include all professionalism competencies in core (required) curricula of all graduate library school programs in the state.

**Recommendation 5:** Support and encourage inclusion of professionalism topics in TLA Conference, district, and regional programming.

**Recommendation 6:** Conduct a follow-up survey (Exhibit V) of library school graduates 24 months from the time the survey for this study was conducted. Refine the survey, administer it every two years, and retain results for consistent longitudinal analysis.
Exhibit I: Roster
Task Force on Library Professionalism Education

Mary Berry: Chair, Department of Library Science, Sam Houston State University

Megan Cooper: Leander ISD Library Coordinator, Leander Independent School District

Andrew Dillon: Dean, UT School of Information, University of Texas at Austin

Ling Hwey Jeng: Director, School of Library and Information Studies, Texas Woman’s University

Karen Hendrick: Head of Public Service, Abilene Christian University

Kathy Hoffman: Executive Director, Research Medical Library, The University of Texas M. D. Anderson Cancer Center

Diane Hopkins: Director/Library Services, North East Independent School District, San Antonio

Bonnie Juergens: Executive Director, Amigos Library Services, Inc. (Chair of Professionalism Task Force)

Eva Poole: Director of Libraries, Denton Public Library

Julie Todaro: Dean, Austin Community College (Chair of New Initiatives Task Force)

Herman L. Totten: Dean, School of Library and Information Sciences, University of North Texas

Mary Jo Venetis: Associate Library Director for Technical Services, McDermott Library, University of Texas at Dallas

Ted Wanner: Continuing Education Specialist, Texas Library Association

Maureen White: Associate Professor, School Library and Information Science Program, University of Houston-Clear Lake
## Exhibit II: Core Competencies and Learning Outcomes
### Relating to Professionalism:
*Ethics, Advocacy, Leadership*

<table>
<thead>
<tr>
<th>CORE COMPETENCIES</th>
<th>LEARNING OUTCOMES</th>
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<tbody>
<tr>
<td>1. Knowledge of the first amendment to the United States Constitution.</td>
<td>1-2: Learners promote intellectual freedom and freedom of speech</td>
</tr>
<tr>
<td>2. Knowledge of the principles of intellectual freedom</td>
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| 3. Understanding of diverse methods used to censor library resources               | 3: Learners identify censorship efforts  
3: Learners respond appropriately to censorship efforts                                                                                                                                                         |
| 4. Knowledge of best practices in providing resources representing diverse points of view | 4: Learners provide resources representing diverse points of view  
4: Learners develop library policies concerning development of collections that represent diverse points of view                                                                                                   |
| 5. Knowledge of best practices for providing equitable customer service and access | 5-6: Learners provide equitable access and service to all library users                                                                                                                                               |
| 6. Knowledge of intellectual property rights                                       |                                                                                                                                                                                                                     |
| 7. Knowledge of best practices in protecting intellectual property rights          | 7: Learners enforce adherence to regulations and laws on copyright, fair use, and sharing of intellectual property  
7: Learners develop library policies protecting intellectual property rights  
7-8: Learners explain the application of intellectual property rights to the library community  
8: Learners relate library services to measurable outcomes that are relevant to the library's parent institution                                                                                      |
| 8. Knowledge of the role of libraries in their parent institution and in society overall |                                                                                                                                                                                                                     |
| 9. Knowledge of community dynamics, including demographic analysis, community policies, laws, and standards | 9: Learners articulate the connections between library standards and the operation of a democratic society  
9: Learners understand community standards and articulate the connections between library and community standards                                                                                       |
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<tr>
<th>CORE COMPETENCIES</th>
<th>LEARNING OUTCOMES</th>
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<tr>
<td>10. Knowledge of social, political, and economic issues affecting libraries</td>
<td>10-12: Learners facilitate negotiation &amp; compromise to advance library support</td>
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<tr>
<td>11. Knowledge of political processes and entities at all levels of government that affect libraries</td>
<td>10-12: Learners obtain library support</td>
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<tr>
<td>12. Knowledge of federal, state, and local laws and regulations</td>
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<td>13. Knowledge of best practices in political action</td>
<td>13-14: Learners build coalitions with support groups &amp; community leaders</td>
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<td>14. Knowledge and skills of collaboration and partnerships</td>
<td>13-14: Learners collaborate and develop partnerships with diverse libraries and library communities</td>
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<tr>
<td>15. Knowledge of laws pertaining to privacy &amp; confidentiality rights of library users</td>
<td>15: Learners write library policies &amp; organizational guidelines protecting privacy rights of library users</td>
</tr>
<tr>
<td></td>
<td>15: Learners comply with all applicable laws &amp; regulations pertaining to privacy rights</td>
</tr>
<tr>
<td></td>
<td>15: Learners advocate for laws &amp; regulations that protect privacy rights of library users</td>
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<td>16. Knowledge of mass media</td>
<td>16-19: Learners develop effective relationships with the press</td>
</tr>
<tr>
<td>17. Knowledge of the value of promotional skills, tools, &amp; techniques in gaining support for libraries</td>
<td>16-19: Learners provide appropriate marketing and public relations activities to gain library support</td>
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<tr>
<td>18. Knowledge of the relevance of the non-profit organization mission to marketing &amp; public relations activities</td>
<td></td>
</tr>
<tr>
<td>19. Knowledge of best practices in conducting marketing &amp; public relations activities for libraries</td>
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<tr>
<td>20. Knowledge of leadership roles and responsibilities</td>
<td>20: Learners articulate vision &amp; direction for the organization</td>
</tr>
<tr>
<td>21. Knowledge of differences between leadership &amp; management roles &amp; responsibilities</td>
<td>20-21: Learners apply leadership skills to achieve library goals</td>
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<td>20-21: Learners inspire others to share in achieving the vision</td>
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<tr>
<td>22. Skills in interpersonal communication, consensus-building, &amp; collaboration</td>
<td>22: Learners facilitate participatory processes to accomplish group goals</td>
</tr>
<tr>
<td>CORE COMPETENCIES</td>
<td>LEARNING OUTCOMES</td>
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<tr>
<td>23. Skills in problem-solving &amp; decision-making</td>
<td>23: Learners identify, analyze, &amp; solve problems</td>
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| 24. Understanding of the values of fairness, respect, & diversity | 24: Learners develop & apply library policies & processes based on fairness, respect, & diversity  
24: Learners treat coworkers & other colleagues with respect, fairness, and good faith and advocate conditions of employment that safeguard the rights & welfare of all employees in their institutions  
24: Learners do not advance private interests at the expense of library users, colleagues, or their employing institutions  
24: Learners maintain professional integrity even if others don’t  
24: Learners identify & correct violations of integrity |
| 26. Knowledge of change management tools & techniques | 26: Learners identify emerging trends & implement appropriate changes to meet library users’ needs  
26: Learners embrace & facilitate risk-taking, adapting and learning from mistakes, to achieve organizational goals |
| 27. Understanding of the value of engaging in professional association activities to enhance professional knowledge, collaborate in achieving goals, & develop professional relationships | 27: Learners participate actively in professional associations  
27: Learners engage in leadership roles in professional associations |
| 28. Understanding of the value of continuous professional education | 28: Learners continue to educate themselves & provide educational opportunities for colleagues  
28: Learners share knowledge & encourage professional growth of colleagues |
| 29. Understanding of the importance of separating personal beliefs and opinions from professional obligations | 29: Learners separate personal opinions from professional obligations  
29: Learners recognize & articulate the value of professional objectivity |
Exhibit III: Suggested Instructional Strategies, Activities, and Techniques

The following strategies, activities, and techniques may be applied in a variety of learning settings and are intended to mix-and-match well for application to the instruction of all “professionalism” topics included in the core competencies chart. The list is intended to suggest diversity in, rather than limits to, approaches for enhancing instruction.

1. Require the reading of primary sources and professional commentary on the topic
2. Discuss readings in live or virtual settings
3. Observe and practice library operations
4. Discuss observations and experiences in live or virtual settings
5. Utilize role-playing, case studies, and/or scenarios
6. Attend special learning opportunities, such as workshops, conferences, programs, and webinars, on the topic
7. Critically analyze existing policies, guidelines, or statements on the topic
8. Write and defend policies, guidelines, or statements on the topic
9. Develop and present reviews, analyses, arguments, or position papers on the topic
10. Research and synthesize literature, reports, observations, or case studies on the topic
11. Write a research paper on the topic
12. Instructors and students model desired behaviors
Exhibit IV: Findings of Research
On The
Content and Delivery Characteristics of Education about
Professional Ethics, Advocacy, and Leadership for Library Workers

Early in its tenure, Task Force members established a set of research goals that included the following:

• Analyze the results of the 2005 member survey on ethics administered by the TLA Professional Rights and Responsibilities Committee. (Kathy Hoffman published results of this study in the fall, 2005, issue of Texas Library Journal: “Professional Ethics and Librarianship”.)

• Review the recommendations of American Library Association (ALA) working groups that address professional ethics, including but not limited to, the ALA Code of Ethics and Core Values documents; Committee on Accreditation Standards; and documents relating to defining mission and objectives of library school programs. Review competency lists developed by various ALA divisions, including ALA Certified Public Library Administrator, ALSC competencies for children’s librarians in public libraries, Association of Legal Administrators, and ACRL’s Information Literacy Competency Standards in Higher Education.

• Analyze the content of coursework relating to professional ethics, advocacy, and leadership that is provided to students by each of the five graduate library education programs in Texas.

• Analyze data collected from recent graduates’ and employers’ surveys conducted by the graduate library education programs. This data was supplemented by data from an informal survey of recent graduates conducted by the Professionalism Task Force. See Exhibit V.

• Review the audience and content relating to professional ethics, advocacy, and leadership in the “Small Library Management” training provided by the Texas State Library and Archives Commission.

• Review information about the ways in which public school districts provide continuing education relating to professional ethics, advocacy, and leadership for school library workers.

• Review information about the ways in which library systems and educational service centers provide continuing education relating to professional ethics, advocacy, and leadership for school library workers.

• Review information about the ways in which non-profit library service organizations in Texas provide continuing education relating to professional ethics, advocacy, and leadership.

• Review information about the ways in which professional associations provide continuing education relating to professional ethics, advocacy, and leadership.

• Review information about the ways in which libraries themselves provide continuing education relating to professional ethics, advocacy, and leadership.
COMMENTARY ABOUT RESEARCH RESULTS

I. Professional Education at the Graduate School Level

Five universities in Texas were asked to provide input regarding coverage of ethics, leadership, and professionalism in their various Library and Information Science programs. These universities are Sam Houston State University, Texas Woman’s University, University of Houston – Clear Lake, University of North Texas, and The University of Texas at Austin.

Collectively, responses indicate that

- All the universities cover these topics in various core courses through a variety of pedagogical methods. The depth of coverage and content varies from course to course and among the schools.
- All require knowledge of the ALA Library Bill of Rights and ALA Code of Ethics and/or codes of ethics for relevant professional associations.
- All use outside resources, do workshops, and/or plan programs or events on the topics.
- All provide a “special topics” course where students can investigate various topics that may include advocacy, professional ethics, and leadership.
- All provide field experiences where students demonstrate ethics, leadership, and professionalism.
- None has a course in the curriculum in which the total content is solely ethics, leadership, and/or professionalism.

Based on the above findings, one could assume all librarians who obtained professional credentials in the state of Texas are equally and fully informed on professionalism topics. However, anecdotal evidence from employers and practitioners suggests that degreed library professionals feel inadequately prepared in the areas of professional ethics, advocacy, and/or leadership. What can explain this seeming anomaly?

Research conducted by the Task Force indicates a lack of consistency among graduate library schools in Texas in the ways each defines and delivers educational content concerning professional ethics, advocacy, and leadership. Philosophies and approaches to providing such education vary and result in a lack of consistency both internally by each institution and across the five institutions. Faculty members at the various schools may benefit from pondering further the fact that “None has a course in the curriculum in which the total content is solely ethics, leadership, and/or professionalism.” Members of the TLA Professionalism Task Force hope that access to the practitioner input represented by this Report and Recommendations will assist faculty members to analyze current offerings and identify ways to strengthen students’ access to professionalism content throughout their library school experience.

II. Professionalism Education and Training for Non-MLS Library Directors

Among continuing education providers, there exists an even more extreme lack of consistency in purpose, content, focus, and delivery characteristics. Data from the 2005 member survey on ethics administered by the TLA Professional Rights and Responsibilities Committee indicate library workers feel they would benefit from access to a more extensive education on professionalism topics such as ethics. For practitioners who experience this need, the question of access to continuing education becomes more pertinent than access during library school. For library managers with hiring responsibility, both learning venues offer the means to achieve a very important end, which is the acquisition of more extensive knowledge about professionalism topics among library workers.
The “Small Library Management” training provided by the Texas State Library and Archives Commission (TSLAC) consistently requires and delivers professionalism content, including discussion about the following topics.

- Professionalism: general criteria; characteristics; responsibilities; expectations; competencies; excellence; issues in the profession…
- Leadership: Vision, mission, and roles of the library; mentoring and role modeling; communications …
- Ethics: Civil liberties; intellectual freedom; privacy, copyright; government information; the ALA Library Bill of Rights and Code of Ethics…
- Advocacy: library funding; federal library programs; communications…

It is the understanding of the Task Force that individuals without MLS degrees who are appointed to manage public libraries in small municipalities in Texas (population under 25,000) are required to participate in the State Library’s “Small Library Management” training. According to records maintained by the Texas State Library and Archives Commission, approximately 65% of directors of public libraries in Texas fall into this category. It is important for library managers who complete this course to have continuing access to information about issues in the profession relating to ethics, advocacy, and leadership.

III. Continuing Professionalism Education for All Library Workers

Public school districts rely heavily on TLA, area library associations, managers within the district libraries, and educational service centers to provide continuing education content for school librarians. Because they support all aspects of public education and focus heavily on teacher education, service centers do not develop continuing education plans for the library specialty. Continuing education opportunities are most often the result of requests received by the centers, and these requests come primarily from teachers. A survey of service centers revealed that while the topics of ethics, advocacy, and leadership are only infrequently the primary focus of sessions offered, professionalism topics are often integrated with other topics as relevant and appropriate.

Large public library systems have the ability to provide continuing education for staff, and do so through internal programs as well as purchasing continuing education programs from service organizations such as Amigos Library Services, Inc. Like smaller public libraries, they also rely heavily on TLA, library systems, and TSLAC to provide applicable continuing education content. Again, access and even the recognition of need for access to professionalism content vary considerably among institutions.

Academic libraries support professional development and continuing education in topics relating to higher education in general, such as plagiarism, copyright, and intellectual freedom. Education in these areas is frequently provided by the parent institution, but it is also provided by the library on many campuses. Academic libraries also support, perhaps to a lesser degree, continuing education on professionalism issues specific to library and information sciences, such as advocacy, marketing, and public relations. Academic libraries in Texas rely less heavily than public libraries on TSLAC to provide applicable continuing education content. They tap a variety of professional associations such as divisions of the American Library Association, the Medical Library Association, the Special Libraries Association, and the Association of Research Libraries, as well as TLA. As with public libraries, access and even the recognition of need for access to professionalism content vary considerably among institutions.

Amigos Library Services is consistently listed by its members as a primary source of continuing education for both public and academic libraries in Texas. For this study, information from Amigos was sought as an example of the types of ethics content currently available from external
continuing education service providers. No polling of additional external CE service providers was undertaken by the Professionalism Task Force as part of its study, and Amigos is not assumed to be representative of other organizations’ professionalism content, but readers are reminded that such service providers are an important source of professionalism content. An examination of professionalism topics in coursework presented by Amigos during 2005 indicates published professional guidelines and/or laws applicable to course topics are addressed extensively. Examples include the ALA Code of Ethics; ALA/RUSA Guidelines for Behavioral Performance of Reference and Information Service Providers and Guidelines for Medical, Legal, and Business Responses; CONTU Copyright Guidelines; and the USA Patriot Act. While these and other professionalism guidelines are covered extensively in diverse courses from Amigos, it is important to note that access to the coursework depends upon the educational prioritization of library managers and the availability of funding to support class attendance. An impediment as significant as limited funding is that of limited time, especially in small libraries dependent upon a very limited number of staff members to meet public service needs.

These same constraints – of funding and time limitations – apply to the ability of library workers in all types of libraries to gain access to continuing education, whether that education is provided by the home organization, professional associations and state agencies, or external service suppliers.

Members of the TLA Professionalism Task Force recognize that TLA plays a critically important role among library workers in all types of libraries to provide access to learning opportunities relating to professionalism. The recommendation that TLA facilitate broad dissemination of the Core Competency Charts developed by this Task Force is intended to increase awareness of the competencies needed and, at the same time, offer suggestions for ways to deliver the content. If managers’ awareness of the need for this education is heightened at the same time that education providers’ ability and commitment to meet the need are heightened, more content should become available to practitioners. TLA is in a unique position to facilitate this heightened awareness on the part of all related parties throughout the state.