Formatting the Competencies List

One of the most practical questions to answer in planning your competencies list is how you plan to format it. This includes the format of each individual competency statement, as well as how you organize and present them as a larger whole.

Factors to Consider in Formatting Individual Competency Statements

Descriptive vs. Task-Based

In all my reading about competencies, after reviewing well over 100 lists of competencies of all kinds from all types of institutions, one clear organizational distinction seems to exist in every list: either the competency statements are descriptive, or they are task-based. Descriptive competency statements are broad and nonspecific (e.g., "Understand how e-mail folders work to create an organized file-keeping system"). Task-based competency statements, on the other hand, are narrowly focused and specific (e.g., "Delete e-mails, move e-mails between folders, and archive old e-mails"). The most successful competencies lists will include both task-based items and more descriptive items about overriding philosophy and knowledge that contribute to a successful, technologically proficient employee. I highly suggest that you consider including both in your library's list of competencies, though you may want to set apart the descriptive, philosophical competency statements as a separate section to show that these competencies can't easily be tested, but are more subjective—things for the person and his or her supervisor to think a little harder about before noting whether or not the staff person has that competency.

Action Verbs

Action verbs are easy to measure. "Can you X? Can you Y?" D. Scott Brandt, in his book *Teaching Technology: A How-To-Do-It Manual for Librarians,* provides us with an excellent list of measurable action verbs in several categories, ideal for competencies lists (see table 2, page 36).[1]

Sentence Structure

Whatever structure the task force decides on, use consistent formatting for each competency statement, (e.g., have an action verb such as "Understand," "Reboot," "Search," "Create," "Troubleshoot" as the first word in the sentence or phrase, and consistently use certain phrases such as "Demonstrates a knowledge of," "Ability to," and "Familiarity with"). Consistency is key.

Word Choice

Use consistent wording in your competency descriptions so that as little as possible is subjective. Be careful of your use of adjectives, which can be interpreted subjectively and differently by each individual. For example, the King County Library requires that a staff member "[e]xpertly searches catalogs, databases and Internet sources."[2] What *exactly* does "expertly" mean? How does one quantify "expertly"? Is my definition of "expertly" the same as that of the super-duper employee who knows the catalog inside and out? Probably not. Because such is the case, try to be as objective and quantitative as you can with the competency descriptions. Additionally, do not use a format like this: "Are you competent?" Just as libraries are moving away from the term "information literacy" (as it requires users to admit "illiteracy" in order to use our services), talking about "incompetence" and "competency" can

Table 2: D. Scott Brandt's list of measurable action verbs from *Teaching Technology: A How-To-Do-It Manual for Librarians* (Neal-Schuman, 2002; www.neal-schuman.com/db/2/272.html). *Source:* Table appears courtesy of Neal-Schuman Publishers.

Affective	Motor Skills	Verbal Knowledge	Intellectual skills	Problem Solving
Enjoy	Drag	Define	Select	Apply
Encourage	Click	Explain	Identify	Determine
Feel (comfort)	Move	Describe	Complete	Hypothesize

easily put someone off of the entire program before even beginning. Perhaps, instead of calling this a list of "competencies," you might want to call it a "learning checklist" or a "training plan." It all depends on the staff environment of your individual library.

Factors to Consider in Formatting the Overall List of Competencies

One Level or Multiple Levels

You can present the competencies as a simple list of what staff members need to know or be able to do. Another option is to break the descriptions of the competencies out into various levels or tiers. Which staff members need to have the competencies in a particular tier may be based on position, desire for promotion, or personal preference. For example:

- Break the competency descriptions into tiers (1, 2, 3), with different staff position being required to meet different tiers, e.g., circulation assistants have the competencies described in tier 1; circulation supervisors have those described in tiers 1 and 2; and reference librarians have those described in 1, 2, and 3.
- Break the competency descriptions into basic, enhanced, and exemplary levels.
- Break the competency descriptions into categories such as "essential" and "extended"; for example, Naylor suggests the terms "critical" or "helpful."[3]
- Break the competency descriptions into Basic, Intermediate, and Advanced levels (as in the State Library of North Carolina's competencies list)[4]

If the library decides to use a multilevel system, the task force may want to define who needs to have the more advanced skills based on factors such as staff classification, specific position, work location, pay step, or desire for promotion or bonus.

Organizing by Position, Department, and Location

If the competencies list has different sections based on staff position, department, or location, then organizing competencies by position may be the easiest way to present that information. Competencies may be broken out by staff position (Library Assistant 1, Librarian 2, Branch Manager), by department (Managers, Reference staff [adult, children's, teen], technical services, circulation), or by location (smaller branches vs. main branch). The competency descriptions for staff at Oakland Public Library are broken down extremely specifically by staff position. The competencies for library aides are further broken down into categories for three types of aides, and those for librarians are further broken down into categories for eight types of librarians based on unit function, size of branch, and so on. All in all, Oakland's competencies list is organized into twenty-three different staff positions, each with its own unique set of competencies.[5] If you use this method, there is going to be a decent amount of overlap among positions. This overlap may make updating competency descriptions a bit more of a chore, since if one description changes, you would, in Oakland's case, potentially have to update it in twenty-three places. If the task force is composing competency descriptions for a small library, or for a library system that includes one or more small libraries, keep in mind that in small libraries where only one or two people are working at once, staff positions don't matter nearly as much. Everyone has to be a generalist. Everyone might have to know everything. As Charlene McGuire writes in a post to the Kansas Tech Consultants Blog, with the first draft of the Technology Core Competencies for Kansas Library Workers, "If it is a one person library then that is the person."[6] It's important to make sure that the competencies list reflects the reality at each library, big or small. You may also want to consider having a basic list of competencies by staff position, with supervisory flexibility to add or remove competencies based on each employee's unique job situation (e.g., a circulation staff where everyone's tasks are specialized, so one person might never deal with the ILS and another may never need to use a word-processing program).

One Giant List with Supervisory Discretion

Some libraries have one giant list of competencies that doesn't necessarily indicate which ones are required in which positions and let individual supervisors determine which competencies are needed by their workers across the board.

Print or Online

The competencies list can be presented in two ways: as a printed or online document. I recommend creating the competencies list primarily as an online document, but with a printable version available (particularly if the task force doesn't plan on using online assessment tools).

- **If Presenting Online:** You can create the competencies list as a simple HTML document, or you can use online tools like a wiki (ready-built for an outline format) or a blog (tagging entries for each competency), or even 43 Things (www.43things.com) as a way to list and check off core competencies (an idea from Stephen Abram in his article "43 Things I Might Want to Do This Year").[7] If the task force creates the competencies list as any type of online document, store all the competency descriptions in one place, preferably in one file. Don't put each category on a different Web page or PDF, a mistake many libraries have made. This type of organization creates unnecessary complications for staff members who are trying to get a complete list of what they need to know, and any barrier to learning is not good for the organization. Everything a staff member needs to know should be in one list, one file. The benefits of having the competencies list online include the ability of staff to access the competency descriptions any time (and presumably from anywhere) as a refresher, the ability to fold the competency descriptions into any online job descriptions and staff manuals, and (my personal favorite) the ability to hyperlink each competency description to a brief how-to document explaining how to do that task. At the first library at which I implemented a set of technology competencies, a valued colleague suggested that the competencies list would benefit greatly from having brief explanations of the steps necessary to complete each task linked from the competencies list. To my knowledge, that library is still the only library with a list of competencies with how-to documents attached to each competency description, although that library's competencies list is available only through its intranet. It's hard to be certain about what competencies documents really are out there for libraries, because many libraries place their staff competencies lists on their intranets only, making them invisible to the public . . . which leads us to the next question.
- **Public or Private:** If the library decides to make the competencies list available online, someone needs to decide whether to post it on the intranet only or on the publicly accessible Web site. Arguments can be made for either decision, though in the age of increasing institutional transparency, I recommend making the document available on the public site (under "About the Library" or wherever the Web site has information about the library's organization and staff). In making the list public, you let the public in on what staff members are expected to know, more often than not surprising them with the high levels of your staff's advanced technological expectations. Again, think of the union or other employee organizations, however; they may have rules about what can and can't be publicly posted regarding staff expectations.

Formatting Options

This section points you to online documents and shows examples of several different options for formatting a competencies list—what it actually looks like when written out and completed. The two basic choices are these: just describe the competencies, or combine the competency descriptions with an assessment tool. If the task force decides to combine the competencies list with the assessment tool, remember to provide space at the top of the list for the employee's name, and perhaps unit or department, start and completion dates, or general comments or questions from the employee.

Present the Competencies Alone

Table 3 (see page 38) illustrates how the Ohio Library Council presents its core technology competencies.

Table 4 (see page 38) shows how the California Library Association presents its technology competencies—in an outline with short, one-line descriptions.

The Upper Hudson Library System (New York) utilizes a narrative paragraph:

> *The Operating Systems*
> The Operating system is the software foundation that enables computers to process information, manipulate data, and provide output to users. It stands to reason that a rudimentary knowledge of how it functions is critical if staff [members] are to be successful in manipulating the information resources. Staff must have a working knowledge of the platform on which their computers sit, an understanding of the interface and desktop environment, the ability to format floppy disks, the ability to create and manage files, and a thorough understanding of how to gain access to the various networks available from a given platform.[8]

Present the Competencies List with an Assessment Tool

Tables 5 through 8 (see pages 38–39) are examples of formatting options that illustrate options for creating visual representations to present competencies lists with assessment tools.

Table 3: Competencies list along with definitions, skills and behaviors, and associated training units ("Ohio Public Library Core Competencies," September 27, 2005, www.olc.org/pdf/core.pdf, 32). *Source:* Reprinted with permission from the Ohio Library Council.

	Competency	Definition	Skills and Behaviors	Possible Training Units
Core Technology Competencies for all Staff	Word Processing Skills	The ability to use a word processing program, such as Microsoft Word.	• Create, format, save, print and open a document • Change font and font size • Cut and paste and Copy and paste • Format a document using *bold, italicize, underline* and *center text* • Use *spell check* • Use *Help*	*Microsoft Word Basic*

Table 4: Outline with short, one-line descriptions. California Library Association, "Technology Core Competencies for California Library Workers," www.cla-net.org/included/docs/tech_core_competencies.pdf (URL accessed January 5, 2007). *Source:* Excerpt from document at URL listed.

Software
• Word Processing
  • Create, format, save, open, and print a document
  • Change font style and size, cut and paste, bold, italicize, underline, and center text
  • Understand print preview
• Web Browsers
  • Understand web browser functions such as back, forward, home, print, and print preview
  • Understand URLs

Table 5: Grid with check boxes for applicability to job, meeting a competency, and area for comments.

Skill	Applies to Job	Meets	Comments
Open browser	X	X	
Show/hide toolbars			
Know library URL	X	X	
Create bookmark	X		Can't identify toolbars

Table 6: Grid with checkboxes for meeting basic or advanced level of each competency.

Skill	Basic	Advanced
Using Internet Browser	X	X
Troubleshooting Printer	X	
Searching Catalog	X	
Organizing Files	X	X

Finalize the Competencies List

Regardless of which of these options you choose, at this point the task force needs to go through the list competencies and narrow it down, finalizing categories and competencies within the categories. Which staff members are required to have which competencies should be clearly in-

dicated. If the task force has difficulty coming to consensus on particular competencies, kick it up the decision-making tree to whatever administrative group or committee exists to make final decisions in cases like these. The task force will have to agree to abide by whatever that group decides, however. Sometimes, remembering that is enough to jump-start the consensus process.

Before *really actually* finalizing the competencies list, make sure that it works for staff. The task force should show the "final" competencies list to a few staff members, asking if anything is confusing or at all unclear. I recommend asking at least two people in any given staffing group (e.g., circulation, reference, technical services, managers). I guarantee that you will gain some final polishing from these interactions. Once the task force is confident that the competencies list is complete, polished, and ready to go, the next step is implementation.

Table 7: The Public Library of Charlotte and Mecklenberg County (North Carolina) utilizes a grid with checkboxes in order to record whether or not an individual meets a competency or if the competency is N/A (Not Applicable) for an individual. ("Information Technology Core Competencies," www.plcmc.org/public/learning/plcmccorecomp.pdf). *Source:* Table appears courtesy of Public Library of Charlotte and Mecklenberg County.

✓	N/A	E.	Operating System Knowledge
✓		1.	Can identify a computer's operating system and version.
✓		2.	Can identify which user is logged in.
		3.	Can log off and on as a different user.
✓		4.	Knows how to use a mouse, keyboard, and function keys.
✓		5.	Knows the functions of the left and right mouse buttons.
✓		6.	Knows how and when to double-click versus single click the mouse.
✓		7.	Can identify the active window.
		8.	Can print to a non-default printer.
	✓	9.	Can cancel a print job (if user permissions allow).
	✓	10.	Can clear the print queue (if user permission allow).
	✓	11.	Can change the default printer (if user permissions allow).

Table 8: The State Library of North Carolina's "Microcomputer Competencies 1997–98" (http://statelibrary.dcr.state. nc.us/comp/competen.htm#hardware) utilizes a grid with "yes" or "no" checkboxes to indicate if a library staff member does or does not meet each competency (http://statelibrary.dcr.state.nc.us/comp/winbasic.pdf, p. 1). *Source:* Table appears courtesy of the State Library of North Carolina. (***Note:*** In March 2007, the State Library of North Carolina posted an updated competencies document, "Technology Competencies for Libraries in North Carolina," at http://statelibrary.dcr.state.nc.us/ce/ competencies.pdf.)

Using My Computer or Windows Explorer employee can:

Yes	No	
x		Display the structure of the computer
	x	Use the +/- icons to expand and contract the file structure of the computer
	x	Use the find command in Windows Explorer to locate a file or folder
x		Rename a file or folder
x		Print a file

Notes

1. D. Scott Brandt, *Teaching Technology: A How-To-Do-It Manual for* Librarians (New York: Neal-Schuman, 2002), 43.
2. King County Library System, "Competencies for Excellence: Reference Librarian," n.d., http://faculty.washington.edu/ jernel/521/kccomp.htm (accessed January 8, 2007).
3. Richard J. Naylor, "Core Competencies: What They Are and How to Use Them," (presentation, Institute on 21st Century Librarianship, Stanford University, Palo Alto, Calif., August 5–11, 2001), http://institute21.stanford.edu/summer/ speakers/trelstad_mag.html (accessed January 17, 2007).
4. State Library of North Carolina, "Microcomputer Competencies," 1997–1998, http://statelibrary.dcr.state .nc.us/comp/competen.htm (accessed January 17, 2007).
5. Oakland Public Library, "Technology Competencies for Library Staff," 1998, www.oaklandlibrary.org/techcomp .htm (accessed January 5, 2007).
6. Charlene McGuire, "Technology Core Competencies," Kansas Tech Consultants Blog, July 27, 2005, http:// kansaslibtech.blogspot.com/2005/07/technology-core -competencies.html (accessed January 9, 2007).
7. Stephen Abram, "43 Things I Might Want to Do This Year," *Information Outlook* 10, no. 2 (Feb. 2006), text available at www.findarticles.com/p/articles/mi_m0FWE/is_2_10/ ai_n16133338 (accessed January 9, 2007).
8. Upper Hudson Library System, "Computer Help Center. Core Competencies," n.d. www.uhls.org/training/com petencies.html (accessed October 12, 2006; this informa- tion on site is not available at this URL when checked in January 2007).