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## Securing Professional Development: Getting to Yes

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A hand in a dark suit and light blue shirt is pointing upwards with the index finger. The hand is positioned in front of a glowing green rectangular button on a digital screen. The button has the word "Yes" written in white. The background is dark and out of focus, showing the person's torso and tie.

Yes

# SECURING PROFESSIONAL DEVELOPMENT GETTING TO YES

Tips for employees seeking funding and training, and how supervisors can balance priorities and respond to requests.

BY CAROLINE OSBORNE, CAROL A. WATSON, & AMY EATON



Professional development and ongoing learning opportunities are essential for the success of information professionals. Regardless of the size of your organization, budgets are finite and securing funding and support for ongoing learning is challenging. A quandary for most employees is how to succeed at the ask.

**H**ow do you make a request for funding, release time, or support for education that permits you to do your existing job better or assists you in preparing for a job that is aspirational and is likely to be successful?

On the flip side, supervisors must balance budget priorities and funding requests. What does a supervisor need to see or hear in a request to help move them to the yes side of things?

Balancing the seesaw of professional development requests with the competing needs of resource allocation, strategic prioritization, and the desire to provide ongoing education and development opportunities is challenging for both employees and supervisors. If you are the employee, how do you make a successful request, and if you are the supervisor, how do you prioritize funding and resources such as time away?

#### **Tips for the Ask**

**Base your “ask” in reality, but do not be afraid to reach a bit as well.** Supervisors like to see initiative and they have an innate desire to support those who are embracing growth. Still, there is the thorny problem of resource allocation. Time and funding are likely to be your greatest obstacles, but there may be other barriers in addition to these. Be thoughtful and attempt to identify where the problem spots in your request might lie.

**Prepare a realistic budget to present to your supervisor that includes estimated costs and time.** Be sure to detail any cost-cutting measures you intend to undertake. Budget is key. Consider proposing a multiyear professional development strategy that includes lower-cost alternatives. Time away may also be challenging. Consider how time spent on professional development impacts your ability to meet deadlines and what, if any

impact, it might have on a colleague. Be prepared to explain your plan for covering your responsibilities during your absence.

**Make the business case for investing in you.** How will this learning opportunity assist you in your present position? If the ask is more aspirational, then what is the future benefit to you and, perhaps most importantly, the organization? How does your request fit into the strategic plan of the library and/or any future goals? Is there a specific need that this training will fill?

**Track the ROI (return on investment) on previous conferences you attended.** Did you implement a successful idea or improve your processes?

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If you are on the receiving end of a request for funding and release time for professional development, how do you allocate resources? Consider how you might demystify the process for all involved.

If you can demonstrate that attending the conference will generate benefits for the institution, you are likely to be more successful with your ask.

**Be reasonable and professional.** Do not treat professional development as an opportunity for a vacation. That is not to suggest that you avoid fun. In fact, a large part of a conference is networking and exchanging ideas. You should enjoy yourself, but remember to bring back what you learned. On your way home, create a list of “take-aways” and be prepared to share that list with your colleagues rather than the vacationesque pictures you took. It is key to use what you learn through professional development. Upon your return, create a dialogue to highlight the benefits your organization will reap by having invested in you.

**Know the philosophy of your employer.** Is there an organizational mandate for development and training? Does the accrediting body (think American Bar Association, Southern Association of Colleges and Schools, or your bar association) require continuing education? Frame your “ask” to be consistent with any such mandates.

### Tips for Responding to Requests

If you are on the receiving end of a request for funding and release time for professional development, how do you allocate resources? Consider how you might demystify the process for all involved.

**Transparency, transparency, transparency, or, perhaps it is process, process, process.** Establish and communicate clear policies. Share your general process and your expectations. What is it you are willing to support and what are you unable to support. Is there any wiggle room? What factors do you need to see in a request? Who are you willing to support? All staff, or professionals only?

**Develop a matrix for allocating funding and share it widely.**

**Draft cost-saving travel guidelines.** Encourage and reward strategies such as travel grant award recipients, early bird registrations, carpooling, and room sharing. Distribute these policies early and widely so that everyone is in the know. Assess your guidelines regularly to ensure they are working as intended and producing the desired results.

**Decide whether you will implement a sliding scale or partial reimbursement policy, or if you will fully fund requests.** Again, be transparent. Do you always preference fully funded requests, or are there times and requests that generally fall into another category that receives partial funding or simply release time? Share where the dotted lines are.

**Identify your priorities and make them known to your staff.** What types of continuing education have a preference and why? Do staff with a leadership role in a professional organization, such as providing a presentation or serving as an officer, receive higher priority when ranking budget requests? Share these priorities early, before the call for programs or nominating committees begin to work.





### Design a conflict resolution process.

This allows you to make equitable decisions and justify them when asked.

### Always have an elevator speech handy that details the benefits of continuing education to higher ups.

Consider how the ability to provide professional development aligns with the stated goals of the institution.

### Require each staff member to create a multiyear professional development plan.

This plan should detail what they want to accomplish, how it aligns with a present or aspirational job, and how it benefits the library. Reinforce the importance of articulating how the library benefits. The plan should also include a spectrum of professional development resources at multiple price points that support the stated goals.

### Consider creative sources of funding for professional development.

For example, the Charles B. Sears Law Library at the University of Buffalo School of Law became an authorized U.S. Passport Acceptance Facility for the general public. In addition to offering a public service for the community, the library used the generated fees to support professional development activities.

### Maximize the Reach of Your Professional Development Resources

There are many resources for continuing education other than travel to a conference. That is not to diminish the value of a conference or suggest that it is a substitute for the “soft” benefits one gets through attending conferences. The reality, however, is that available resources are limited, and seeking creative ways to stretch your resources is beneficial. Thinking outside the box is another way of maximizing professional development opportunities. Make use of your low-cost, local, and in-house resources.

When we frame the discussion on professional development, we often focus on our professional staff. It is important to keep all staff engaged and interested in continuous learning.



## PROFESSIONAL DEVELOPMENT RESOURCES

- Dorie Clark, “Plan Your Professional Development for the Year,” *Harv. Bus. Rev.* (January 7, 2016). [bit.ly/JF18Hbr](http://bit.ly/JF18Hbr)
- Mike Crawford, “Why Professional Development Matters to the Success of a Company,” *The Bus. J.* (September 1, 2016). [bit.ly/JF18Busj](http://bit.ly/JF18Busj)
- Robert Half, “Are You Asking for Professional Development Training the Right Way?” (September 14, 2015). [bit.ly/JF18Half](http://bit.ly/JF18Half)
- Laura Katz, “Importance of Professional Development,” Small Business Development Center, University of Georgia. [bit.ly/JF18Georgia](http://bit.ly/JF18Georgia)
- Victor Lipman, “Why Employee Development Is Important, Neglected and Can Cost You Talent,” *Forbes* (January 29, 2013). [bit.ly/JF18Forbes](http://bit.ly/JF18Forbes)
- Alyssa Martino, “How to Get Your Company to Fund Professional Training and Development,” *brazenblog* (July 10, 2017). [bit.ly/JF18Brazen](http://bit.ly/JF18Brazen)
- Karen Porter, “How to Ask Your Boss to Have the Company Pay for You to Attend a Conference, Seminar or Workshop,” *The Effective Admin* (June 16, 2017). [bit.ly/JF18Admin](http://bit.ly/JF18Admin)

When we frame the discussion on professional development, we often focus on our professional staff. It is important to keep all staff engaged and interested in continuous learning.

The tips below work both for maximizing your available spend and providing opportunities for non-professional staff. Encourage your non-professional staff to take a leadership role in creating and managing some of these low-cost options.

- Consider local resources available on campus, in your law firm, or within your organization. Your technology department may welcome the opportunity to share tips on maximizing the use of mobile devices, provide trainings on software that will increase efficiencies, or even tailor trainings to your specific requests. Business schools, administrative professionals, and statistics departments from local colleges and universities are great resources.
- Local organizations are excellent resources to tap for an on-site lunch or other event. Contact your local police department to discuss personal and worksite safety; invite the Red Cross or someone from your city's emergency management team to discuss emergency preparedness; or start a toastmaster's club to increase comfort levels with public speaking.
- Support membership in your local or regional American Association of Law Libraries (AALL) chapter. Membership dues are inexpensive and chapters often provide regular meetings with educational sessions that may benefit all of your staff. They also offer opportunities for participation in programming, committees, and leadership. These are often overlooked, but are wonderful chances for development.
- Create a book or article club that selects and discusses titles of professional interest. Select books or articles that provoke conversation and encourage diverse opinions. There are many websites that offer advice on how to make reading selections and guide group discussions.
- Identify TED Talks, podcasts, Twitter chats, or other free online resources that might fill a gap in knowledge. Take advantage of webinars such as the AALL2go series. Follow up by hosting a facilitated group discussion afterwards.
- Create a Lean Coffee talk time where common ideas can be shared and discussed. Lean Coffee discussions have no advance agendas. Participants gather, build an agenda, and begin talking. (For more information, visit [bit.ly/JF18Lean](http://bit.ly/JF18Lean).)
- Take advantage of continuing education courses and certification programs from local colleges, online institutions, or other professional organizations. You might also consider many of the free or low-cost online courses available such as edX, Coursera, Udemy, or Lynda.com.
- Reach out to other types of libraries in your community. Are there common topics of interest to your organizations? Can you join forces and obtain group discounts? Can you share expertise among different types of libraries? Perhaps you can form a local library organization to discuss library-related topics?

### Professional Development— Your Future

Creating transparent processes and thinking outside the box benefits both the employee and the institution.

Likewise, planning for and thinking about opportunities for professional development has the added value of providing enrichment that will benefit both the employee and the institution in multiple ways. Professional development expands the collective knowledge of a workplace, enhances job satisfaction, and increases employee retention rates. Be creative and forward-thinking as it will pay dividends. ■

#### AALL2go EXTRAS

Watch the 2017 AALL Annual Meeting program "Show Me the Money: Funding Professional Development," at [bit.ly/AM17Prodev](http://bit.ly/AM17Prodev).

Watch the 2016 AALL webinar "Creating Non-Traditional Leadership Opportunities for Professional Growth and Institutional Excellence," at [bit.ly/AALL2go0516lead](http://bit.ly/AALL2go0516lead).



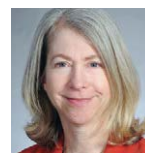
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