

Human Services Staff Development and Training Roles and Competencies: Manager

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APHSA American Public Human Services Association
NSDTA National Staff Development and Training Association

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The National Staff Development and Training Association

(an affiliate of the American Public Human Services Association)

The National Staff Development and Training Association (NSDTA) was founded in 1983 and incorporated as an affiliate of APHSA in 1985 to support persons responsible for human service training and staff development on the local, state, or federal level.

VISION: NSDTA has a vision of competent and caring people in effective organizations creatively working together to improve the well-being of society's children, adults, and families.

MISSION: NSDTA builds professional and organizational capacity in the human services through a national network of membership sharing ideas and resources on organizational development, staff development, and training.

OBJECTIVES:

- To promote a network of contacts to discuss and disseminate best practice methods and strategies.
- To provide a national forum for discussion of staff development and training issues.
- To provide leadership in the development of local, state, and federal programs and procedures which enhance the skills of staff and develop standards and evaluation criteria for training programs nationwide.
- To develop public policy recommendations and advocate for staff development and training issues.
- To create opportunities for continual learning and professional development for itself as an organization and for its members.

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Membership of NSDTA consists of persons who are responsible for consultation, delivery, promotion, or management of staff development, training, personnel, or human resource development on the local, state, or federal level. Membership in NSDTA requires APHSA membership. Please designate NSDTA as your choice of an affiliate organization. To join APHSA, contact Doris Pollard at:

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ACKNOWLEDGEMENTS

This manual is part of a series of guidebooks developed by the Standards Committee of the National Staff Development and Training Association (NSDTA). As such, it continues and develops the work begun in the first manual, *A Key to Success: Guidelines for Effective Staff Development & Training Programs in Human Service Agencies* (NSDTA/APWA, 1993). *A Key to Success* provides basic information about the essential components for effective staff development and training programs. Such areas as the organization of the staff development and training function, staffing, resources, processes, policies, and procedures are examined.

In 1997, as chair of the Standards Committee, I coordinated the production of the first competency model: the Instructor Competency Model. This has proved to be a very useful tool for the field and is being used by many agencies in selection, appraisal and professional development of trainers. The work of the committee has continued with the production of two additional models: the Manager and Administrative Support staff.

I wish to acknowledge the care and rigorous work of the committee that researched and developed these guidebooks over a two-year period under the guidance of the committee's new chair, Freda Bernotavicz. In developing the models for the Manager and Administrative Support staff roles, the Standards Committee developed a more comprehensive matrix of the competencies and functions of staff development and training staff. As a result the Instructor Competency Model has been revised and reissued.

Leadership for this effort was provided by Freda Bernotavicz, who is the senior author of this series. Jim McGroarty provided invaluable advice to the group in drawing their attention to the 1982 study of Public Child Welfare Staff Development and reminding them of the importance of continuity in our work. In addition to developing the conceptual framework for the roles, outputs and competencies, Freda coordinated the work of the Standards Committee, did background research for additional competency data and made the necessary edits to move the process along. Rose Wentz was responsible for reorganizing and editing the Instructor model to be consistent with the new framework and for reviewing all three reports for consistency. Final editing was done by Freda with the patient assistance of Janice Overlock who formatted and reformatted multiple drafts throughout the process.

I would also like to express my appreciation to the NSDTA members who provided feedback on the draft materials at the 2000 NSDTA Annual Conference in New York City. It is with great admiration that I acknowledge the teamwork and dedication of the following members of the Standards Committee in producing this information.

Mary Urzi, President
National Staff Development and Training Association

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MANAGER COMPETENCY MODEL

BACKGROUND

In 1993, the National Staff Development and Training Association (NSDTA) Standards Committee published *A Key to Success: Guidelines for Effective Staff Development and Training Programs in Human Service Agencies* (NSDTA/APWA, 1993). One of the guidelines addresses trainer competencies: “The function is staffed by competent, qualified professional and clerical personnel.” (p. 6).

The NSDTA Standards Committee decided to take this guideline and develop a set of competencies (knowledge, skills, and characteristics) that define the role of instructor.

The resulting publication in 1997 was the first in a planned series that at the time was described as not definitive, but as work that can be modified or added to as needs and professional evolution dictate. Since that time, the Standards Committee has further refined the concept of staffing of the field and expanded the roles which need to be performed.

DEFINITION OF ROLES

The Staff Development and Training field is staffed by people who perform a different mix of roles. Roles are not synonymous with jobs or people. In a large organization, a higher degree of specialization exists and it is possible that individuals may have only one key role. However, in smaller organizations staff often wear multiple hats and may perform multiple roles.

Based upon a review of the literature and several rounds of review and discussion with leaders in the field, the committee identified nine major roles. Two major sources from the literature were utilized in developing this listing: *Models for HRD Practice* (McLagan and Suhadolnik, 1989) which describes the eleven roles in the training and development field and tends to reflect private sector staffing and *Public Welfare Staff Development: A Role and Competency Framework for Curriculum Development and Instruction* (Kinney, Cooke and Fox, 1982) which identifies six roles for staffing in public welfare training programs. Both studies provided invaluable information which was updated to reflect emerging priorities. The following chart shows how the roles are reflected in the proposed NSDTA listing.

ROLES AND COMPETENCIES IN PUBLIC HUMAN SERVICES STAFF DEVELOPMENT AND TRAINING (NSDTA 2000)	PUBLIC WELFARE STAFF DEVELOPMENT: A ROLE AND COMPETENCY FRAMEWORK FOR CURRICULUM DEVELOPMENT AND INSTRUCTION (Kinney, Cooke and Fox, 1982)	MODELS FOR HRD PRACTICE (McLagan and Suhadolnik, 1989)
• Administrative Support	•	• Administrator
• Communications Specialist	•	• Marketer
• Evaluator/Researcher	• Evaluator/Researcher	• Evaluator • Researcher
• Human Resource Planner	• Manpower Planner	
• Instructional Media Specialist	• Instructional Media Designer	• HRD Materials Developer
• Instructor/Trainer	• Instructor/Trainer	• Individual Development Advisor • Instructor or Facilitator
• Manager	• Manager	• HRD Manager
• Organizational Development Specialist	• Assessor/Consultant	• Needs Analyst • Organizational Change Agent
• Training Program and Curriculum Designer	• Curriculum Designer	• Program Designer

DEFINITIONS OF NSDTA ROLES

Administrative Support: The role of providing the administrative support to ensure that the facilities, equipment, materials, participants and other components of a learning event are present and that program and organizational logistics run smoothly.

Communications Specialist: The role of designing processes and materials for storage, retrieval and dissemination of information and products within the program and to other target audiences.

Evaluator/Researcher: The role of identifying the impact of an intervention and of developing and testing theories of learning, training, development and transfer of learning.

Human Resource Planner: The role of planning for the utilization and development of human resources.

Instructional Media Specialist: The role of designing systems for and producing written or electronically-mediated instruction.

Instructor/Trainer: The role of facilitating individual performance improvement including delivering training, directing structured learning and facilitating groups.

Manager: The role of facilitating and leading a group's work including linking training and development with other organizational units and monitoring contract activities.

Organizational Development Specialist: The role of facilitating organizational improvement, including assessing training needs, diagnosing organizational problem areas, consulting on OD strategies, and conducting team building sessions.

Training Program and Curriculum Designer: The role of developing programs and curriculum including defining the content and outcomes, selecting and sequencing appropriate learning activities, writing modules and developing case studies..

DISCUSSION OF NSDTA ROLES

Administrative Support: This role is similar to the Program Administrator role in the ASTD model (McLagan, 1989). However, in the NSDTA model, this role is conceptualized as the logistical support role most often played by classified staff. The competency model for this role is based on a model developed for secretarial support (Bernotavitz, 1984).

Communications Specialist: This role corresponds with the Marketer role in the ASTD study. However, unlike that role which focuses on "selling", this role also reflects the need within the public arena to develop mechanisms to share information both within the training agency, with the client agencies and with the field as a whole. In addition, this role incorporates the librarian function of storage and retrieval of information and products.

Evaluator/Researcher: Two trends in the human services training and development field are making this role more critical. One is the increased demand for accountability and results and the need to demonstrate a relationship between training and improved program outcomes. The other is the need to design training which is most efficient and effective both in terms of learning activities and delivery systems and which builds on theories of learning.

Human Resource Planner: In some states, such as New York, this role is a large part of the job of individuals who work for the public agency. Their responsibility is to predict future manpower needs of the agency and assist in planning for the necessary types of training. The name of the role has been updated from Manpower Planner to Human Resource Planner.

Instructional Media Specialist: This role draws on instructional media rather than program content expertise. The individual in this role converts and formats materials which have already been designed, selecting the most appropriate media to fit the learning goals.

Instructor/Trainer: This role focuses on performance improvement for individuals or groups and includes both preparation of individuals for training (development planning), direct delivery of instruction and follow up activities to promote transfer of learning. A competency model was developed for this role by NSDTA in 1999.

Manager: This role reflects both the traditional role of the manager in planning, organizing, and staffing operations or projects and the strategic role of developing long-range plans to accomplish the mission of the training and development program.

Organizational Development Specialist: In contrast to the Instructor/Trainer role, this role focuses on organizational performance improvement and includes a number of functions outside the scope of traditional classroom training.

Training Program and Curriculum Designer: Unlike the Instructional Media Specialist, this role requires program knowledge and includes both specifying learning goals, the design of interventions and writing content.

OUTPUTS OF NSDTA ROLES

Outputs are the tangible results or products of the roles. The following list is intended to be illustrative and can act as a guide to clarifying roles and responsibilities within a specific program or agency.

Administrative Support: Facility and equipment selections and schedules; inventory and projections of future equipment needs; records of programs and clients (training transcripts, Continuing Education Credits (CEUs), attendance and evaluation documents); logistical support and service to participants; on-site program support and staff management; functioning equipment; contracts and agreements to provide services.

Communications Specialist: Positive image for products, services and programs; plans to disseminate products, services and programs; promotional and information material; articles, presentations, catalogs of training materials and curriculum, reports, articles, websites, resource libraries, public service announcements.

Evaluator/Researcher: Evaluation and research designs and plans; instruments; evaluation processes; evaluation feedback; concepts, theories or models of development or change; data analysis and interpretation; current evaluation and research findings, conclusions and recommendations; best practices; information on future forces and trends.

Human Resource Planner: Predictions of future staffing needs; analysis of retention issues; recruitment strategies; plans for program staffing requirements; skill surveys; data on staff; analysis of legislation and regulations to determine agency staff needs; competency models; task analysis; job descriptions; employee development plans, tools for performance management.

Instructional Media Specialist: Graphic, video-based material or live broadcasts; audio or computer-based material; print-based learner material; job aids; instructor and facilitator guides; hardware and software purchasing specifications; advice on media use; recommendations on appropriateness of media-based training.

Instructor/Trainer: Learning environment; presentation of materials; facilitation of structured learning events (such as case studies, role plays, games, simulations and tests); facilitation of group discussions; facilitation of media-based learning events (such as videotapes, films, audiotapes, teleconferences, and computer-assisted

instruction); test delivery and feedback; group members' awareness of their own group process; feedback to learners; individual action plans for learning transfer; individuals with new knowledge, skills and attitudes.

Manager: Staff work direction, plans and performance management; resource acquisition and allocation; linkage to other groups or organizations; budgets and financial management; work environment, strategy, structure and long range plans; policy; negotiating and monitoring of agency and contract training and consultation; project plans and progress reports; priorities; evaluation of process (goals, outcomes and activities); management of training tracking system.

Organizational Development Specialist: Teams; resolved conflicts for an organization or groups; diagnosis of organizational problem areas; performance analysis; assessment of training needs; consultation on O.D. strategies: changes in group norms, values or culture; designs for change; client awareness of relationships within and around the organization; plans to implement organization change; implementation of change strategies; recommendations to management regarding training and development systems; strategies for analyzing individual or organizational behavior; tools to measure individual, workgroup or organizational performance discrepancies; recommendations for needed change in individual, work-group or organizational performance; definitions and descriptions of desired individual or group performance.

Training Program and Curriculum Designer: Program or intervention objectives and designs; learning activities; role plays; case studies; training and curriculum modules; learning objectives; competency-based approaches, transfer of learning techniques, adult learning principles.

DEFINITIONS OF COMPETENCIES

Prior to developing the Instructor model, the committee reviewed a number of definitions of competencies and made a conscious decision not to endorse a single definition or approach, but to develop a set of competencies that embraced multiple approaches. Those definitions that were most useful in guiding the work were the following:

- ◆ “A competency is a grouping of the knowledge and skills necessary for the performance of a job task. Competent workers have the knowledge and skills they need to perform their jobs.” (Hughes and Rycus, 1989, p. 9).
- ◆ “[A competency is] any attribute of a person that underlies effective performance; a job competency is simply an attribute related to doing a job effectively. People carry with them a wide assortment of knowledge, abilities, interests, traits, and motives, but unless these attributes relate demonstrably to doing a job well, they are not job competencies.” (Klemp, 1981, p. 55).
- ◆ “A competency is an underlying characteristic of an individual that is causally related to criterion-referenced effective and/or superior performance in a job situation.” (Spencer and Spencer, 1993, p. 9).
- ◆ “[Competencies are] internal capabilities that people bring to their jobs. They may be expressed in a broad, even infinite, array of on-the-job behaviors.” (McLagan, 1989, p. 77).

- ◆ “Skill -- those activities at which one is proficient or capable of being proficient. For example, a tennis player must be proficient at using a racket (a skill); a musician must be proficient at playing an instrument (also a skill).” (Powers, 1992, p. 15).
- ◆ “Knowledge -- the state of knowing about or understanding something, such as knowing about tennis or understanding music.” (Powers, 1992, p. 15,16).
- ◆ “Characteristics -- those traits that constitute a person’s character, such as enthusiasm, honesty, integrity, and so on.” (Powers, 1992, p. 16).

ROLE/COMPETENCY MATRIX

To help organize the data, the committee built upon the competency clusters previously identified: Administration, Communications, Course Design, Evaluation, Group dynamics/Process, Instructional Techniques, Learning Theory, Manpower Planning, Person/Organization Interface, Research and Development, Training Equipment and materials, Training Needs Analysis (Kinney, Coke and Fox, 1982). The following changes were made to the listing:

- Conceptual Knowledge/Skills, Information Management and Self-Management Skills were added;
- Human Resource Management replaced Manpower Planning and Logistics replaced Training Equipment and Materials;
- Evaluation was added to Research and Development.

A matrix showing all of the roles and competencies is on the following page.

*** (insert chart here)***.

While each role requires a different mix of competencies, there are also core competencies which are common to all of the roles. These include: Cultural Sensitivity, Conceptual Knowledge/Skills (Problem Analysis, Judgment, Conceptual Thinking) and Self-Management Skills (Self-Responsibility, Self-Control, Flexibility and Professional Standards/Ethics). Recognizing the growing importance of competencies related to Information Management, this function was added and Basic Computer Skills has been included as a core competency.

Comprehensive competency models were developed for two roles (Administrative Support and Manager) and the Instructor/Trainer model has been updated to make it consistent with the role/competency matrix. To promote consistency across all of the roles, the following format was utilized for each of the competencies:

- Competency name,
- brief definition of the competency, and
- behavioral indicators or examples of ways in which the individual demonstrates the competencies stated as action verbs.

Note that while some competencies are common to more than one role, the behavioral indicators may be different reflecting a different level of responsibility.

USES

A set of competencies translates the functions of a role into the specific skills, knowledge, and characteristics needed to perform on the job. Any agency or organization that has a training and staff development component can take these competency statements and rate their importance (high, moderate, low, none) to that particular agency. Once rated, the remaining competencies can be used in several ways:

- **Human Resource Planning**

The role/competency matrix can be used to look at functions across a staff development program to identify gaps or needs, to reallocate responsibilities and roles to existing staff and to plan for new roles and positions.

- **Developing Job Descriptions**

The role/competency matrix can also be used as the basis for developing job descriptions. The role definitions and outputs can guide defining job responsibilities and the matrix provides a framework for grouping roles into positions.

- **Career Pathing**

The matrix can be used to identify both horizontal and vertical career paths for professional growth and development.

- **Recruiting/Selecting Applicants for a Position**

The competency statements can be used to more clearly frame job descriptions and interview questions, to help both managers responsible for hiring and job candidates better determine if they have the attributes, interest, and experiences suitable to the role(s) in question.

- **Strengths Inventory and Professional Development**

The competency statements can be used as an inventory instrument by a person in the role to determine the degree (high, moderate, low, none) to which s/he possesses the needed knowledge, skills, and characteristics. This in turn can guide an individual's professional development plan to acquire needed competencies or enhance existing ones through courses, workshops, mentoring/coaching, and other methods of professional development. A sample assessment instrument is provided as an appendix in this report.

- **Performance Management/Appraisal**

The competency statements can be used as the basis of the yearly performance appraisal cycle, providing clear articulation of expectations, on-going feedback and coaching, plans for professional development, and other components of the appraisal process.

- **Curriculum Development**

Certain agencies (particularly state agencies or universities which manage training functions) undertake the development of courses or workshops addressing the development of skills for staff development and training staff. Competency statements can usefully drive the development of these curricula.

DEVELOPMENT OF THE MANAGER COMPETENCY MODEL

The committee began with a draft model for the role of a manager of a staff development and training unit (Bernotavicz, 1995). This model was based upon an extensive review of the literature of management competencies (e.g. Boyatzis, 1982). The information was reformatted to be consistent with the competency clusters and the committee reviewed several iterations. Additional information was added to develop a comprehensive listing of the competencies needed by an individual in the Manager role (for example, the Human Resource Management competencies were based upon a study conducted by the Society for Human Resource Management).

A draft of the competency model was presented at a session of the NSDTA annual conference in New York City in August, 2000. The model was enthusiastically received by the participants who provided feedback and recommendations for revisions that have been incorporated into this version.

MANAGER COMPETENCY MODEL OUTLINE

Administration

1. Organizational Ability
2. Human Service Policy Framework
3. Training Administration
4. Financial Management
5. Project Planning

Communication

6. Communication Skills
7. Cultural Sensitivity

Conceptual Knowledge/Skills

8. Problem Analysis
9. Judgment
10. Conceptual Thinking

Evaluation and Research

11. Evaluation and Research Planning
12. Basic Concepts

Group Dynamics/Process

13. Team Leadership
14. Interpersonal Understanding
15. Empowering Others
16. Teamwork and Cooperation

Information Management

17. Basic Computer Skills
18. Information Management Planning
19. Systems Thinking
20. Information Systems

Human Resource Management

21. Human Resource Planning and Recruitment
22. Employee and Labor Relations
23. Human Resource Maintenance
24. Performance Management

Instructional Management

25. Training Systems

Learning Theory

26. Learning and Human Development

Person/Organization Interface

27. Impact and Influence

28. Initiative

29. Information Seeking

30. Decisiveness and Directness

31. Organizational Development

Self Management Skills

32. Self-Responsibility

33. Self-Control

34. Flexibility

35. Organizational Commitment

36. Professional Standards/Ethics

MANAGER COMPETENCY MODEL COMPREHENSIVE LISTING

ADMINISTRATION

1.00 Organizational Ability

Ability to demonstrate organizational skills.

- 01.01 **Work Management:** Shows ability to plan, schedule, and direct the work of self and others.
- 01.02 **Work Assignments:** Balances task requirements and individual abilities (matching people and assignments).
- 01.03 **Work Organization:** Organizes materials or activities to accomplish tasks efficiently.
- 01.04 **Goal Setting:** Sets challenging yet achievable goals for self and others.

2.00 Human Service Policy Framework

Ability to demonstrate understanding of human service policy and laws.

- 02.01 **Human Services Philosophy and History:** Demonstrates understanding of relevant human services history, theory, values and ethical considerations.
- 02.02 **Federal/State Laws and Regulations:** Demonstrates knowledge of federal/state laws, legislation, regulations and agency guidelines.
- 02.03 **Legislative Process:** Understands the state and/or federal legislative process and its impact on programs.
- 02.04 **Administrative Policies/Regulations:** Demonstrates knowledge of pertinent program and administrative rules, policies, procedures and regulations.

3.00 Training Administration

Ability to demonstrate training administration skills.

- 03.01 **Planning:** Demonstrates knowledge of the concepts of strategic, operational and long

range planning.

03.02 **Current Issues:** Demonstrates understanding of current issues that affect the organization.

03.03 **Policies and Procedures:** Understands key policies and operating procedures of the organization.

4.00 Financial Management

Ability to demonstrate understanding of financial management.

04.01 **Budget Issues:** Understands budgeting techniques and procedures for operating within a planned budget.

5.00 Project Planning

Ability to demonstrate understanding of project planning.

05.01 **Project Planning Process:** Understands operational (project) planning; knows its role in a comprehensive agency planning process; and knows the proper role of various levels of agency management in project planning.

05.02 **Planning Steps:** Applies the steps common to any planning process, i.e. Gathering and analyzing information, defining the problem(s) or opportunity(ies), determining goals and objectives, evaluating available resources, identifying action steps, managing implementation of the plan, and evaluating success.

05.03 **Impact Assessment:** Knowledge of techniques of assessing the potential impact of internal and external barriers on the planning process, both from within the agency and from outside sources.

COMMUNICATION

6.00 Communication Skills

Ability to demonstrate communication skills.

06.01 **Versatility:** Recognizes different communication patterns and strategies and demonstrates the ability to think and speak in response to immediate

situations.

06.02 **Methods:** Chooses appropriate oral or written language to reach an audience, following established standards for correct and effective usage.

06.03 **Style:** Speaks and writes clearly and to the point.

06.04 **Range of Methods:** Uses visuals, handouts, and various media resources as appropriate to present information.

7.00 Cultural Sensitivity

Ability to demonstrate effective cross-cultural communication techniques.

07.01 **Cross-Cultural Diversity:** Identifies differences in cultural, ethnic, and religious values, perceptions, customs, and beliefs.

07.02 **Cross-Cultural Interactions:** Identifies ways of communicating and establishing relationships with others from different cultural backgrounds.

CONCEPTUAL KNOWLEDGE/SKILLS

8.00 Problem Analysis

Ability to demonstrate effective problem analysis skills.

08.01 **Identifying Elements:** Seeks out relevant data and analyzes complex information to determine the important elements of a problem situation.

08.02 **Approaches:** Uses critical judgment to assess alternative approaches to problems or decisions.

08.03 **Analysis:** Identifies underlying issues or causes and gaps between theory and practice.

9.00 Judgment

Ability to demonstrate sound judgment.

09.01 **Using Information:** Reaches sound conclusions and makes reasonable decisions based on available information.

09.02 **Balance:** Balances short- and long-term considerations.

- 09.03 **Priorities:** Sets priorities for tasks in order of importance.
- 09.04 **Objectivity:** Maintains objectivity in handling difficult issues, events, or decisions.

10.00 Conceptual Thinking

Ability to demonstrate conceptual thinking.

- 10.01 **Frameworks and Experience:** Uses theoretical frameworks as well as learning from past experience to guide analysis or actions.
- 10.02 **Past Experience:** Applies past experience to interpret events, seeing crucial similarities and differences in present and past situations.
- 10.03 **Systems View:** Looks at the big picture to assess a situation, focuses on interactions and dynamics thereby creating a climate for action, recognizes tension as a catalyst for positive change.

EVALUATION AND RESEARCH

11.00 Evaluation and Research Planning

Ability to demonstrate evaluation and research planning skills.

- 11.01 **Strategic Planning:** Provides leadership for strategic planning for program and training research and evaluation including linking with agency goals, resources, purpose of evaluation and decisions about what to evaluate.
- 11.02 **Building External Support:** Understands the ways in which program managers and staff can support research and evaluation and is able to use position and personal influence to build support.
- 11.03 **Building Internal Support:** Understands the leadership role of the manager in building internal support for research and evaluation including the development of supportive policy and processes and assignment of organizational resources.
- 11.04 **Utilizing Consultants:** Understands the factors to consider when utilizing internal and external consultants for evaluation of organizational training programs.

12.00 Basic Concepts

Ability to demonstrate understanding of basic evaluation and research concepts.

- 12.01 **Evaluation and Research Purpose:** Understands the process and importance of identifying the purpose, audience and questions to be answered.
- 12.02 **Training Evaluation Levels:** Understands the levels of impact of evaluation, the issues related to each and is able to use this framework to recommend an evaluation plan.
- 12.03 **Evaluation and Research Design:** Understands basic concepts and terminology related to design such as pre and post-tests, sampling, control and comparison groups, experimental and quasi-experimental design.
- 12.04 **Data Collection Instruments:** Describes types of measures for data collection including questionnaires, attitude or satisfaction surveys, paper-and-pencil or performance tests, interviews, focus groups, observations, administrative performance records.
- 12.05 **Data Collection Issues:** Understands basic concepts related to data collection such as validity and reliability and practical issues in selection and administration of data collection measures.
- 12.06 **Data Analysis:** Understands general concepts of data analysis including qualitative and quantitative data, process and outcome data, descriptive or inferential and cost benefit analysis.
- 12.07 **Reporting and Dissemination:** Understands types of reports (formative and summative), the role of reporting interim and final results and provides leadership and support for stakeholder involvement, providing feedback and disseminating results.

GROUP DYNAMICS/PROCESS

13.00 Team Leadership

Ability to demonstrate team leadership skills.

- 13.01 **Vision:** Shows ability to involve staff and to communicate a compelling vision and inspire genuine motivation and commitment.
- 13.02 **Group Problem Solving:** Engages with others in team process to solve

problems.

- 13.03 **Conflict Resolution:** Works with others to find a win/win resolution of differences.
- 13.04 **Management Style:** Shows awareness of how management style impacts on staff productivity and development.
- 13.05 **Situational Leadership:** Modifies leadership style to meet situational requirements.
- 13.06 **Focus:** Manages within a context of multiple or ambiguous directives while staying focused on major goals.

14.00 Interpersonal Understanding

Ability to demonstrate interpersonal understanding.

- 14.01 **Understanding Others:** Perceives strengths, needs, challenges, and feelings of others.
- 14.02 **Diversity:** Understands and values diversity and different styles of perceiving, learning, communicating, and operating.
- 14.03 **Emotional Sensitivity:** Recognizes emotion-laden issues or situations and handles them with sensitivity.
- 14.04 **Responding to Others:** Uses understanding based on listening and observation to anticipate and prepare for others' reactions.

15.00 Empowering Others

Demonstrates ability to empower others.

- 15.01 **Positive Outlook:** Looks for the good in others, recognizing strengths.
- 15.02 **Feedback and Credit:** Gives performance-related feedback to improve or maintain good performance; credits others individually and publicly for their accomplishments; reprimands in private.
- 15.03 **Staff Support:** Supports staff by providing training opportunities, expert help, or additional information or tools to get the job done.
- 15.04 **Participation in Problem Solving:** Invites staff to address problems

affecting performance.

15.05 **Staff Guidance:** Guides staff toward achieving goals by delegating and monitoring work as well as supporting initiative and high-risk efforts.

15.06 **Staff Empowerment:** Empowers staff to make decisions at lowest appropriate level.

16.00 Teamwork and Cooperation

Ability to demonstrate effective teamwork and cooperation skills.

16.01 **Input:** Solicits ideas and opinions for specific decisions and plans.

16.02 **Information:** Keeps people informed and up-to-date about activities, sharing all relevant or useful information that affects the group.

16.03 **Group Process:** Shows the group process skills needed to get diverse groups of people to work together effectively to achieve a common goal.

16.04 **Conflict Management:** Prevents or defuses unnecessary conflict.

16.05 **Alliances:** Builds alliances and teams to achieve program outcomes.

INFORMATION MANAGEMENT

17.00 Basic Computer Skills

Ability to demonstrate basic computer skills including e-mail, scheduling and word processing.

17.01 **Computer Basics:** Applies basic computer concepts including the ability to turn on computer, log on and turn off, display start and help menus, opening programs, using the mouse, moving cursor within documents, deleting files and using recycle bin.

17.02 **E-Mail:** Utilizes e-mail to compose, reply to and forward messages attach files and save attachments, set up files and file messages.

17.03 **Scheduling:** Utilizes scheduling including creating new tasks, viewing editing and deleting appointments, printing appointments.

17.04 **Word Processing:** Utilizes the word processing function including editing and maneuvering, selecting, deleting and inserting text indenting paragraphs, cut, copy and paste, saving and securing documents.

18.00 Information Management Planning

Ability to demonstrate information management planning skills.

- 18.01 **Assessing Need and Resources:** Continually scans environment internally and externally to identify new approaches and technology to meet organization's information needs.
- 18.02 **Developing Systems:** Provides leadership and support for development of systems including their interface with other organizations.

19.00 Systems Thinking

Ability to demonstrate information systems thinking.

- 19.01 **Information Systems Concept:** Understands the concept of information systems in general and is aware of the core interfaces with program information and plans for future development.
- 19.02 **Data and Information:** Understands the distinction between data and information and is able to convert data into information to support decision-making.
- 19.03 **Policy and Practice Link:** Understands and conveys to others the link between program policy and practice via information systems.
- 19.04 **Importance of Quality Data:** Understands and conveys to others the link between entering quality data into records and improving training delivery.

20.00 Information Systems

Ability to demonstrate understanding of information systems.

- 20.01 **Data in System:** Knowledge of the data, its location and organization in the system and its potential for providing information.
- 20.02 **Management Usage:** Understands how to utilize a computer-based management information system to manage effectively.
- 20.03 **Using Information:** Demonstrates the ability to utilize information in

management practice.

20.04 **Critical Data:** Demonstrates the ability to identify and locate critical data within a system.

20.05 **Computer/PC Knowledge:** Knowledge and understanding of word processing, spreadsheet and database software packages which are considered the best/most efficient on the market.

HUMAN RESOURCE MANAGEMENT

21.00 Human Resource Planning

Ability to demonstrate human resource planning skills.

21.01 **Forecasting:** Identifies/forecasts organization's human resource needs.

21.02 **Recruitment and Selection:** Develops and implements recruitment and selection strategies.

21.03 **Internal Placement:** Improves internal placement processes/strategies.

21.04 **HR Systems:** Plans and administers effective career development, performance management and succession planning systems.

21.05 **Personnel Research:** Utilizes existing personnel information to analyze organizational situations to determine the appropriate research methodology, and interpret and communicate results to senior management.

21.06 **HR Information Systems:** Assesses the type and amount of employee information the HR functions should maintain and implement processes/systems to gather analyze, store, and retrieve that information base.

22.00 Employee and Labor Relations

Demonstrates understanding of employee and labor relations issues.

22.01 **Personnel Laws/Regulations:** Has knowledge of and is able to interpret personnel laws, rules and regulations that impact employees from both union and union-free environments.

- 22.02 **Union and Non-union Environment:** Aware of the issues involved in managing in a union and non-union environment, applying collective bargaining strategies and tactics where appropriate.
- 22.03 **Discipline and Grievance:** Knowledge of discipline and grievance handling policies and procedures with union and non-union employees.

23.00 Human Resource Maintenance

Demonstrates understanding of human resource maintenance issues.

- 23.01 **Compensation and Benefits:** Designs and administers fair and equitable reward systems that serve to attract, motivate and retain/satisfy employees from all levels and functions of the organization.
- 23.02 **Training and Development:** Develops and implements systems to assess and address employee training and development needs, plan training activities that address skill requirements to meet current and evolving organizational needs, and formulate realistic development plans that focus on building skills to develop employees.
- 23.03 **Workplace Learning:** Understands the importance of on-going job related learning and makes efforts to develop opportunities.
- 23.04 **Health, Safety and Security:** Understands the strategic health, safety and security issues and concerns from both the employee and organizational perspective; the laws and regulations that impact this HR functional area and the programs; systems and rules to maintain employee wellness and organizational stability.

24.00 Performance Management

Demonstrates understanding of performance management issues.

- 24.01 **Goal-Setting:** Sets measurable objectives for the group and individuals.
- 24.02 **Self-Assessment:** Understands and communicates the importance of self-assessment including design of learning goals, criteria for judging progress, and process for determining action steps.
- 24.03 **Techniques for Assessment:** Utilizes a consistent

assessment process; using multiple types of quantitative and qualitative data and drawing on multiple sources to make judgements.

- 24.04 **Role of Evaluation:** Appreciates importance of frequent, fair and objective performance evaluation and models effective practice.

INSTRUCTIONAL MANAGEMENT

25.00 Training Systems

Demonstrates understanding of issues related to training systems.

- 25.01 **Mission of the Organization:** Understands the mission of the client organization and promotes its mission and values throughout training.
- 25.02 **Self-Directed Learning:** Understands and is able to apply the concepts of “participant-centered” training.
- 25.03 **Job-Related Training:** Understands the role of training in the on-going professional development of the individual within the context of bureaucracy; and communicates the role of training in enhancing the human resource component of the organization.
- 25.04 **Learning Organizations:** Understands the role of generative, continual learning in promoting high performance organizations.
- 25.05 **Competency-Based Approaches:** Understands the principles and techniques of competency-based approaches to human resource management.
- 25.06 **Knowledge of Instructional Media:** Understands the types of instructional media and the role of each in a comprehensive staff development and training program.
- 25.07 **Performance Problem Analysis:** Knows how to make decision that training is solution rather than other action.

LEARNING THEORY

26.00 Learning and Human Development

Ability to demonstrate understanding of how adults learn.

- 26.01 **Learning Theory:** Knows the principles of adult learning theory, emerging information on cognitive development/brain function and their implications for learning.
- 26.02 **Personal/Learning Styles:** Knows conceptual frameworks for describing different personal and learning styles; understands their implications for individual development.
- 26.03 **Context for Learning:** Understands the impact of current experiences on values, attitudes, and behaviors; recognizes the implications for training.
- 26.04 **Self-Awareness:** Understands the critical role of self-awareness for both trainers and participants who are engaged in interactive learning.
- 26.05 **Reflective Practice:** Understands the concept of reflective practice in promoting individual and organization ability to learn from experience.

PERSON/ORGANIZATION INTERFACE

27.00 Impact and Influence

Ability to demonstrate understanding and skills of impact and influence.

- 27.01 **Anticipation:** Anticipates effects of an action on people, programs, or events.
- 27.02 **Organizational Awareness:** Demonstrates awareness of organizational goals and concern for image and reputation of the agency and program.
- 27.03 **Approaches:** Uses appropriate approaches to achieve desired results.
- 27.04 **Using Information:** Anticipates significant information necessary for decision making.
- 27.05 **Versatility:** Relates effectively with all levels of administration inside and outside the organization.

28.00 Initiative

Ability to demonstrate initiative

- 28.01 **Action:** Initiates timely action rather than waiting to react as situations

develop.

- 28.02 **Opportunities:** Recognizes and seizes opportunities.
- 28.03 **Confronts Barriers:** Confronts barriers to effective performance and takes action to overcome them.
- 28.04 **System Knowledge:** Uses knowledge of the system to identify long-term opportunities and problems.

29.00 Information Seeking

Ability to demonstrate information seeking skills.

- 29.01 **Information Identification:** Identifies what information is needed and the proper source for it.
- 29.02 **Questioning:** Seeks out exact information or resolution of discrepancies by asking a series of pertinent questions.
- 29.03 **Open to Cues:** Looks for potential opportunities or for miscellaneous information that may be of future use.
- 29.04 **Interaction:** Observes and interacts with personnel in action.

30.00 Decisiveness and Directness

Demonstrates decisiveness and directness.

- 30.01 **Need for Decisions :** Recognizes when a decision is required.
- 30.02 **Decision-making:** Makes timely decisions based on available data.
- 30.03 **Firmness:** Maintains and/or explains positions when under pressure from others, confronting resistance if necessary.
- 30.04 **Open to Change:** Shifts positions if new information indicates.
- 30.05 **Directive:** Gives directions or orders based on personal authority, rules, and procedures when a situation requires.

31.00 Organizational Development

Demonstrates understanding and skills in organizational development.

- 31.01 **Theories:** Demonstrates knowledge of organizational behavior and organizational development theories.
- 31.02 **Intervention Techniques:** Demonstrates knowledge of organizational development techniques (eg. Survey feedback, team building, group process, total quality management tools.)
- 31.03 **Promoting Collaboration:** Demonstrates knowledge of ways to develop effective collaborations both inside and outside the organization.
- 31.04 **Organizational Change:** Demonstrates knowledge of theory and dynamics of organizational change, as well as techniques of managing cultural change within the organization to impact organizational effectiveness.

SELF MANAGEMENT SKILLS

32.00 Self-Responsibility

Ability to demonstrate self-responsibility.

- 32.01 **Self-knowledge:** Describes and evaluates own performance in terms that reflect recognition of personal strengths and challenges.
- 32.02 **Personal Responsibility:** Takes responsibility for mistakes, failures, or shortcomings.
- 32.03 **Reflective Practice:** Learns from mistakes, analyzes own performance to understand failures and to improve future performance.
- 32.04 **Self-development:** Engages in continued efforts to clarify personal values and to carry out plans for professional development to meet personal and agency needs.
- 32.05 **Development Planning:** Sets learning goals and implements a plan to further skills and knowledge beyond current job.

33.00 Self-Control

Ability to demonstrate self-control.

- 33.01 **Grace Under Pressure:** Performs effectively when under pressure and during opposition.

33.02 **Impulse Control:** Holds back on impulse to say or do something; replaces impulsive behavior with more appropriate response.

34.00 Flexibility

Demonstrates ability to respond effectively to challenges and change.

34.01 **Fairness:** Recognizes the pros and cons of alternatives and accepts the validity of opposing views.

34.02 **Open to Change:** Shows willingness and ability to change managerial structures and processes when needed to implement agency change strategies.

34.03 **Flexible Application:** Flexibly applies rules or procedures, depending on the individual situations, to accomplish agency's larger objectives.

34.04 **Versatility:** Adapts behavior or approach to adjust appropriately to the situation.

35.00 Organizational Commitment

Demonstrates commitment to the organization.

35.01 **Responsiveness:** Adjusts work-related priorities and activities to meet agency needs.

35.02 **Building on Strength:** Recognizes and builds on the strength of the agency and its organizational environment.

35.03 **Goal Focus:** Maintains focus on agency goals.

36.00 Professional Standards/Ethics

Demonstrates ability to conduct self in an ethical and honest manner.

36.01 **Legal Issues:** Complies with all copyright laws and the laws and regulations governing the position.

36.02 **Confidentiality:** Maintains confidentiality and integrity in the practice of the profession.

36.03 **Professional Conduct:** Supports peers and avoids conduct which impedes the practicing of the profession

- 36.04 **Public Service:** Improves public understanding of human resource development and management.
- 36.05 **Accurate representation:** Fairly and accurately represents credentials, qualifications, experience and abilities.

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5.00 **Project Planning**

05.01 Project Planning Process _____

05.02 Planning Steps _____

05.03 Impact Assessment _____

COMMUNICATION

6.00 **Communication Skills**

06.01 Versatility _____

06.02 Methods _____

06.03 Style _____

06.04 Range of Methods _____

7.00 **Cultural Sensitivity**

07.01 Cross-Cultural Diversity _____

07.02 Cross-Cultural Interactions _____

CONCEPTUAL KNOWLEDGE/SKILLS

8.00 **Problem Analysis**

08.01 Identifying Elements _____

08.02 Approaches _____

08.03 Analysis _____

9.00 **Judgment**

09.01 Using Information _____

09.02 Balance _____

09.03 Priorities _____

09.04 Objectivity _____

10.00 **Conceptual Thinking**

- 10.01 Frameworks and Experience _____
- 10.02 Past Experience _____
- 10.03 Systems Views _____

EVALUATION AND RESEARCH

11.00 Evaluation and Research Planning

- 11.01 Strategic Planning _____
- 11.02 Building External Support _____
- 11.03 Building Internal Support _____
- 11.04 Utilizing Consultants _____

12.00 Basic Concepts

- 12.01 Evaluation and Research Purpose _____
- 12.02 Training Evaluation Levels _____
- 12.03 Evaluation and Research Design _____
- 12.04 Data Collection Instruments _____
- 12.05 Data Collection Issues _____
- 12.06 Data Analysis _____
- 12.07 Reporting and Dissemination _____

GROUP DYNAMICS/PROCESS

13.00 Team Leadership

- 13.01 Vision _____
- 13.02 Group Problem Solving _____
- 13.03 Conflict Resolution _____
- 13.04 Management Style _____

13.05	Situational Leadership	_____
13.06	Focus	_____
14.00	Interpersonal Understanding	
14.01	Understanding	_____
14.02	Diversity	_____
14.03	Emotional Sensitivity	_____
14.04	Responding to Others	_____
15.00	Empowering Others	
15.01	Positive Outlook	_____
15.02	Feedback and Credit	_____
15.03	Staff Support	_____
15.04	Participation in Problem Solving	_____
15.05	Staff Guidance	_____
15.06	Staff Empowerment	_____
16.00	Teamwork and Cooperation	
16.01	Input	_____
16.02	Information	_____
16.03	Group Process	_____
16.04	Conflict Management	_____
16.05	Alliances	_____
INFORMATION MANAGEMENT		
17.00	Basic Computer Skills	
17.01	Computer Basics	_____
17.02	E-Mail	_____

17.03	Scheduling	_____
17.04	Word Processing	_____
18.00	Information Management Planning	
18.01	Assessing Need and Resources	_____
18.02	Developing Systems	_____
19.00	Systems Thinking	
19.01	Information Systems Concept	_____
19.02	Data and Information	_____
19.03	Policy and Practice Link	_____
19.04	Importance of Quality Data	_____
20.00	Information Systems	
20.01	Data in System	_____
20.02	Management Usage	_____
20.03	Using Information	_____
20.04	Critical Data	_____
20.05	Computer/PC Knowledge	_____

HUMAN RESOURCE MANAGEMENT

21.00	Human Resource Planning	
21.01	Forecasting	_____
21.02	Recruitment and Selection	_____
21.03	Internal Placement	_____
21.04	HR Systems	_____
21.05	Personnel Research	_____

21.06	HR Information Systems	_____
22.00	Employee and Labor Relations	
22.01	Personnel Laws/Regulations	_____
22.02	Union and Non-union Environment	_____
22.03	Discipline and Grievance	_____
23.00	Human Resource Maintenance	
23.01	Compensation and Benefits	_____
23.02	Training and Development	_____
23.03	Workplace Learning	_____
23.04	Health, Safety and Security	_____
24.00	Performance Management	
24.01	Goal-Setting	_____
24.02	Self-Assessment	_____
24.03	Techniques for Assessment	_____
24.04	Role of Evaluation	_____
INSTRUCTIONAL MANAGEMENT		
25.00	Training Systems	
25.01	Mission of the Organization	_____
25.02	Self-Directed Learning	_____
25.03	Job-Related Training	_____
25.04	Learning Organizations	_____
25.05	Competency-Based Approaches	_____
25.06	Knowledge of Instructional Media	_____

25.07 Performance Problem Analysis _____

LEARNING THEORY

26.00 **Learning and Human Development**

26.01 Learning Theory _____

26.02 Personal/Learning Styles _____

26.03 Context for Learning _____

26.04 Self-Awareness _____

26.05 Reflective Practice _____

PERSON/ORGANIZATION INTERFACE

27.00 **Impact and Influence**

27.01 Anticipation _____

27.02 Organizational Awareness _____

27.03 Approaches _____

27.04 Using Information _____

27.05 Versatility _____

28.00 **Initiative**

28.01 Action _____

28.02 Opportunities _____

28.03 Confronts Barriers _____

28.04 System Knowledge _____

29.00 **Information Seeking**

29.01 Information Identification _____

29.02 Questioning _____

29.03 Open to Cues _____

29.04	Interaction	_____
30.00	Decisiveness and Directness	
30.01	Need for Decisions	_____
30.02	Decision Making	_____
30.03	Firmness	_____
30.04	Open to Change	_____
30.05	Directive	_____
31.00	Organizational Development	
31.01	Theories	_____
31.02	Intervention Techniques	_____
31.03	Promoting Collaboration	_____
31.04	Organizational Change	_____
SELF MANAGEMENT SKILLS		
32.00	Self-Responsibility	
32.01	Self-knowledge	_____
32.02	Personal Responsibility	_____
32.03	Reflective Practice	_____
32.04	Self-Development	_____
32.05	Development Planning	_____
33.00	Self-Control	
33.01	Grace Under Pressure	_____
33.02	Impulse Control	_____
34.00	Flexibility	

34.01	Fairness	_____
34.02	Open to Change	_____
34.03	Flexible Application	_____
34.04	Versatility	_____
35.00	Organizational Commitment	
35.01	Responsiveness	_____
35.02	Building on Strength	_____
35.03	Goal Focus	_____
36.00	Professional Standards/Ethics	
36.01	Legal Issues	_____
36.02	Confidentiality	_____
36.03	Professional Conduct	_____
36.04	Public Service	_____
36.05	Accurate Representation	_____