

Human Services Staff Development and Training Roles and Competencies: Training Program and Curriculum Designer

APHSА 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 that 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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FOREWORD

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 proved to be such a useful tool for the field that NSDTA decided to continue the work of developing competency models under the guidance of Freda Bernotavicz who became the new chair of the Standards Committee.

I wish to acknowledge the care and rigorous work of the committee in researching and developing additional models. The committee has developed a comprehensive matrix of the competencies and functions of staff development and training staff. This is the seventh in a proposed series of nine publications which includes a revision of the original Instructor model.

Leadership for this effort is 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 coordinates 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 is responsible for reviewing all of the reports for consistency. Final editing was done by Freda with the patient assistance of Louise Nicholas who formatted and reformatted multiple drafts throughout the process.

It is with great admiration that I acknowledge the teamwork and dedication of the following members of the Standards Committee in producing this information.

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TRAINING PROGRAM AND CURRICULUM DESIGNER 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 staff 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 that 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.

Training Program and Curriculum Designer Competency Model

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.

Training Program and Curriculum Designer Competency Model

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 (Bernotavicz and Clasby 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 in both hard copy and electronic forms.

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 resulting in 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.

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; training program 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 available as an addendum to this report.

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 have now been developed for several roles (Administrative Support, Evaluator/Researcher, Instructional Media Specialist, Manager, and Organizational Development Specialist) 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 is 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 focus.

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 TRAINING PROGRAM AND CURRICULUM DESIGNER
COMPETENCY MODEL**

The role of the Training Program and Curriculum Designer (TPD) is an integral part of the training development process. The function of the TPD is to consider the topic content that must be delivered and the objectives that must be met, and to integrate them into a comprehensive training package. The TPD focuses on the needs of adult learners, and writes content that accommodates diverse learning styles and fits the pace and style of the human service field.

Experienced practitioners with diverse knowledge and experience in human services training design developed the TPD model. The model is reflective of components from the existing instructor model with additional skills and abilities included to complete the set of competencies needed to function as a training program designer.

The competencies listed in this model show the expansive knowledge and expertise needed to perform as a TPD. Based on the process for training development utilized, agencies may place emphasis on different components of the model. This emphasis on certain competencies will be driven by an organization's needs and purpose at a given time.

**TRAINING PROGRAM AND CURRICULUM DESIGNER COMPETENCY MODEL
OUTLINE**

Administration

1. Human Services Policy and Framework
2. Organizational Ability
3. Project Planning

Communication

4. Interpersonal Communication
5. Non-Verbal Communication
6. Writing Skills
7. Cultural Sensitivity

Conceptual Knowledge/Skills

8. Problem Analysis
9. Judgment
10. Conceptual Thinking

Curriculum Design

11. Preparation for Learning
12. Instructional Design Strategies
13. Development of Materials

Group Dynamics Cluster

14. Interpersonal Understanding
15. Managing Process
16. Group Climate

Information Management

17. Knowledge Management
18. Computer Skills

Instructional Management Cluster

19. Assessment and Transfer

Learning Theory

20. Learning and Human Development
21. Learning Climate

Logistics

22. Audio-Visual and Multimedia Aids
23. Distance Learning

Self-Management

24. Self-Responsibility
25. Self-Concept
26. Self-Control
27. Flexibility
28. Job Commitment
29. Professional Standards/Ethics

**TRAINING PROGRAM AND CURRICULUM DESIGNER COMPETENCY MODEL
COMPREHENSIVE LISTING**

ADMINISTRATION

1.00 Human Services Policy Framework

Ability to demonstrate understanding of human services policy, regulations, and laws.

- 01.01 **Human Services Philosophy and History:** Demonstrates understanding of relevant human services history, theory, values and ethical considerations.
- 01.02 **Human Services Field Understanding:** Demonstrates knowledge of the services, processes and structure of the customer (e.g. state-level bureaus, local non-profit and governmental human service agencies) being served, and the forces affecting the field.
- 01.03 **Federal, State Laws and Regulations:** Demonstrates knowledge of federal and state laws, legislation, regulations and agency guidelines.

2.00 Organizational Ability

Ability to demonstrate organizational skills

- 02.01 **Work Management:** Shows ability to plan, schedule, and direct his or her work while maintaining ability to adapt to change in a prompt manner.
- 02.02 **Work Assignments:** Demonstrates ability to handle multiple projects, balancing task requirements and individual abilities.
- 02.03 **Work Organization:** Organizes materials or activities to accomplish tasks efficiently in order to meet project deadlines.

3.00 Project Planning

Ability to demonstrate understanding of project planning.

- 03.01 **Project Management Process:** Demonstrates ability to work collaboratively to manage a project; knows the role of project management in the curriculum development process and the roles of the various members of the project team.
- 03.02 **Planning Steps:** Applies the steps common to any planning process, i.e. gathering and analyzing information, defining the training need, determining goals and objectives, evaluating available resources, identifying action steps, managing implementation of the plan, and evaluating success.
- 03.03 **Goal Implementation:** Ensures that goals are converted into efficient action steps; focuses on achieving results despite conflicting priorities, limited resources, or ambiguity.

- 03.04 **Impact Assessment:** Assesses the potential impact of internal and external barriers on the planning process, both from within the agency and from outside sources, i.e. customers, legislators.

COMMUNICATION

4.00 Interpersonal Communication

Ability to communicate with individuals and groups.

- 04.01 **Expectations:** Discusses expectations with project leader and team and relates expectations to the project objectives.
- 04.02 **Clear Explanations:** Adequately explains the project participant roles, requests feedback, and presents information in a manner that the intended purpose is achieved.
- 04.03 **Probing Techniques:** Uses interviews, questions, and other probes to gather information and stimulate project participant insight..
- 04.04 **Feedback:** Provides constructive feedback to project team and to project participants and groups in order to encourage continued progress.
- 04.05 **Modeling:** Models effective communication skills.
- 04.06 **Listening Skills:** Uses active listening skills to gather information, encourage discussion, and elicit feedback from the project participants.

5.00 Non-Verbal Communication

Ability to use nonverbal behaviors to effectively communicate.

- 05.01 **Eye Contact:** Frequently makes culturally appropriate eye contact with the project participants.
- 05.02 **Appropriate Behavior:** Refrains from distracting behaviors and mannerisms.

6.00 Written Communication Skills

Ability to communicate effectively in writing.

- 06.01 **Writing Skills:** Prepares written material that follows generally accepted rules of style and form, is appropriate for an audience of adult learners, is creative, and accomplishes its intended purpose.
- 06.02 **Writing Level:** Customizes language and style commensurate with the level and sophistication of the participant group.

7.00 Cultural Sensitivity

Ability to demonstrate effective cross-cultural communication techniques.

- 07.01 **Cross-Cultural Diversity:** Adapts communication and behaviors in order to interact effectively with different types of individuals or groups.
- 07.02 **Cross-Cultural Sensitivity:** Recognizes and validates the differences in cultural, ethnic, and religious values, perceptions, customs, and behaviors.
- 07.03 **Cross-Cultural Content:** Integrates cultural content into the curriculum when relevant.
- 07.04 **Cross-Cultural Discussion:** The curriculum developed promotes opportunities to engage in the discussion of cultural issues.
- 07.05 **Managing Conflict:** Manages disagreement and conflict concerning cultural issues.

CONCEPTUAL KNOWLEDGE/SKILLS

8.00 Problem Analysis

Ability to clarify issues by breaking them down into meaningful components.

- 08.01 **Identifying Elements:** Seeks **out** relevant data and analyzes information to determine the important elements of a job, task, training content, and/or problem situation (i.e. training needs of an agency).
- 08.02 **Approaches:** Uses critical judgment to assess alternative approaches to problems or decisions.
- 08.03 **Analysis:** Identifies underlying issues 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 and availability of resources.
- 09.04 **Objectivity:** Maintains objectivity in handling difficult issues, events, or decisions.

10.00 Conceptual Thinking

Ability to see patterns and synthesize related items.

- 10.01 **Intellectual Versatility:** Recognizes and explores new ideas and practices; thinks both creatively and logically without undue influences from personal biases.

- 10.02 **Frameworks and Experience:** Uses theoretical frameworks as well as learning from past experience to guide analysis and actions.
- 10.03 **Experience:** Applies past experience to interpret events, seeing crucial similarities and differences in present and past situations.
- 10.04 **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.
- 10.05 **Creative Thinking:** Is comfortable with risk-taking in thinking; plays with ideas.

CURRICULUM DESIGN

11.00 Preparation For Learning

Ability to engage participants and/or supervisors prior to the learning activity.

- 11.01 **Needs Assessment:** Assesses participant needs, including the knowledge and skill requirements associated with participant job functions or position, and makes appropriate adjustments to training objectives.
- 11.02 **Participant Engagement:** Designs approaches to engage participants prior to the session (reading, activities, learning plan).
- 11.03 **Supervisor Engagement:** Provides supervisors and agency management with information and knowledge needed to support the participants during the entire learning process.
- 11.04 **Reinforcement of Learning:** Designs opportunities for communicating with supervisors and participants, both before and after training to introduce learning objectives and to reinforce learning.

12.00 Instructional Design Strategies

Ability to design training programs and curriculum.

- 12.01 **Research:** Conducts research to ensure that materials include up-to-date information reflecting best practice. Works with content experts to gain necessary knowledge to develop a curriculum.
- 12.02 **Lesson Objectives:** Creates measurable and sequential learning objectives that can be presented at the beginning of the session both orally and in writing.
- 12.03 **Training and Development Techniques:** Knows the characteristics and critical attributes, advantages, and disadvantages of the techniques and formats used in training (e.g. case scenarios, role playing, discussions, text material, programmed instruction).

Training Program and Curriculum Designer Competency Model

- 12.04 **Information Flow:** Properly sequences the content and flow of training to allow for the level and sophistication of the participant group.
- 12.05 **Modes of Expression:** Creates activities that use multiple modes of expression to convey and to gather information (e.g., uses all five senses).
- 12.05 **Uniform Format and Methodology:** Establishes and maintains a uniform training format and selects appropriate methodologies to support learning objectives.
- 12.06 **Examples:** Creates opportunities within training session for trainer to provide or elicit from participants relevant examples, anecdotes, stories, analogies, and/or humor.
- 12.07 Competency-based approaches:** Understands the principles and techniques of competency-based approaches to curriculum development.

13:00 Development of Materials:

Ability to develop a variety of learning materials.

- 13.01 **Range of Techniques:** Creates a range of techniques (e.g., paced presentations, concrete examples, analogies, non-verbal activities, or media presentations) to convey key ideas ensuring that learning methods match competencies to be developed.
- 13.02 **Curriculum guides:** Develops guides to help integrate content for training programs .
- 13.03 **Instructional packages:** Develops instructional packages to incorporate a variety of materials.
- 13.04 **Scripts:** Writes scripts, when appropriate, for lessons or entire programs.
- 13.05 **Experiential exercises:** Designs worksheets, role plays, simulations, games, case scenarios, critical incidents, in-basket activities in order to evoke insight or motivate participants by giving them a concrete problem to address and help participants demonstrate competence or subject mastery following training; and/or simulate the human services work experience artificially and vicariously to evoke the discovery of new ideas to take back to the work site.
- 13.06 **Performance Aids:** Designs desk aids and other material to be used on the job.
- 13.07 **Questioning:** Creates open or closed questions that are related to the lesson objectives.
- 13.08 **Job-Relevant:** Uses job-specific materials and references to enhance the relevancy of the training material and help participants relate the training content to their job function

GROUP DYNAMICS CLUSTER

14.00 Interpersonal Understanding

Ability to demonstrate interpersonal understanding.

- 14.01 **Valuing Participants:** Maintains and enhances participants' self-esteem by valuing and listening to each member of the group.
- 14.02 **Empathy:** Shows empathy by viewing situations from the perspective of others.
- 14.03 **Feedback:** Provides timely, sensitive, and relevant feedback and challenges ideas in a positive, respectful way.
- 14.04 **Genuineness:** Behaviorally conveys congruence of words and underlying values of project.

15.00 Managing Process

Ability to manage group process including conflict and difficult situations.

- 15.01 **Managing Conflict:** Resolves problems and manages conflicts through negotiations, aiming for win-win agreements.
- 15.02 **Maintains Focus:** Refocuses straying groups so as to adhere to the project plan.
- 15.03 **Difficult Situations:** Manages problem situations (e.g., hostile participants, disengaged participants, and those who monopolize) in a positive, respectful way.

16.00 Group Climate

Ability to establish and maintain an effective group climate.

- 16.01 **Ground Rules:** Negotiates and clarifies with the group what constitutes effective/ineffective behavior and establishes ground rules.
- 16.02 **Group Decision-Making:** Involves the group in discussing and making decisions on process and procedures.
- 16.03 **Buy-in/Advocacy:** Builds ownership and support for training materials and other training products.
- 16.04 **Environment:** Creates an environment where participants feel psychologically safe to explore ideas and disagree.
- 16.05 **Confidentiality:** States clearly what information will stay within the group and what information may be shared with others (such as administrators).

INFORMATION MANAGEMENT

17.00 Knowledge Management

Ability to develop and implement systems for creating, managing, and distributing information.

17.01 **Library Skills:** Gathers, organizes, and maintains information from printed and other recorded sources and makes the material available to interested parties.

17.02 **Resource Skills:** Identifies and utilizes information specialists, reference services, and aids.

18.00 Computer Skills

Ability to apply basic computer concepts, utilizing e-mail, scheduling, word processing, and presentation software.

18.01 **Computer Basics:** Applies basic computer concepts including the ability to display start and help menus, open programs, use the mouse, move the cursor within documents, and understand file management skills (e.g. storing and retrieving data, deleting files and using recycle bin).

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

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

18.04 **Word processing:** Uses word processing functions, including editing and maneuvering, selecting, deleting and inserting text, indenting paragraphs, cut, copy and paste, saving and securing documents.

18.05 **Presentation Software:** Uses presentation and basic graphics software to create visual presentations that enhance and clarify the training material (e.g., Microsoft PowerPoint, Microsoft Paint).

INSTRUCTIONAL MANAGEMENT CLUSTER

19.00 Assessment and Transfer

Ability to assess learner performance and promote transfer of meaning.

19.01 **Transfer of Learning:** Creates learning activities for participants and/or their supervisors to facilitate the transfer of learning from a classroom experience to a practical application and continue the learning process on the job.

19.02 **Evaluation of Participants:** Creates activities to measure and assess learner performance as it relates to the training objectives.

- 19.03 **Live Training Evaluation:** Develops a quality-based assessment of training material by observing its effectiveness in live training situations in order to evaluate, modify, and update the material.
- 19.04 **Formative Evaluation:** Develops assessments of training material prior to its dissemination in live training situations to evaluate efficacy, providing customers/stakeholders with results of the evaluations and revising the training package consistent with those results.

LEARNING THEORY

20.00 Learning and Human Development

Ability to apply understanding of how adults learn.

- 20.01 **Learning Theory:** Understands the principles of adult learning theory and human development theory and can implement them in a variety of ways in the training design process.
- 20.02 **Contexts for Learning:** Understands the impact of past and current experiences of the trainer and participants on their values, attitudes, and behaviors and recognizes the implications for training design.
- 20.03 **Self-Directed Learning:** Enhances participants' awareness of their capacity for self-directed learning and the use of their own experiences in guiding their learning.
- 20.04 **Personal/Learning Styles:** Knows conceptual frameworks for describing different personal and learning styles and their implications for individual development and for training.

21.00 Learning Climate

Ability to create a positive learning climate.

- 21.01 **Positive Climate:** Believes that participants can learn and are capable of performing all the tasks presented in the training.
- 21.02 **Motivation:** Creates material that engages and motivates adult learners to integrate new ideas and practices into existing ones.
- 21.03 **Accelerated Learning:** Creates materials that value the utilization of music, peripherals, and the physical learning environment.

LOGISTICS

22.00 Audio-Visual and Multimedia Aids

Ability to utilize audio-visual multimedia aids.

- 22.01 **Multi-Media Resources and Technology:** Demonstrates knowledge of resources and methods and their applicability to course objectives.

22.02 **Application:** Constructs various aids to enhance presentations and facilitate learning, including multimedia, computer technology, and conventional audio-visual aids.

22.03 **Presentation Methods:** Creates alternative presentation methods in the event of an equipment malfunction.

23.00 Distance Learning

Ability to utilize distance learning.

23.01 **Instructional Methodology:** Selects the most appropriate methodology for distance learning based on cost effectiveness and participant needs.

23.02 **Instructional Media:** Knows the functions, features, and potential applications of electronic systems for training (e.g. computer- and web-based training, teleconferencing, expert systems, interactive video, and satellite networks).

23.03 **Instructional Approaches:** Creates appropriate teaching techniques to fit the requirements of the technology.

SELF-MANAGEMENT SKILLS

24.00 Self-Responsibility

Ability to engage in ongoing learning to improve professional capabilities.

24.01 **Self-Awareness:** Identifies personal values, needs, interests, style, and competencies and their effects on others.

24.02 **Reflective Practice:** Uses reflective practice in a regular and systematic way to assess the effects of his/her choices and actions on others (participants, colleagues, agency personnel, community members).

24.03 **Relationship Building:** Establishes, strengthens, and maintains credibility, trust, and confidence with individuals and groups.

24.04 **Professional Growth:** Actively seeks out opportunities to grow professionally, including learning from the expertise and perspectives of colleagues.

24.05 **Knowledge of Field:** Stays up-to-date on program policy and best practices.

25.00 Self-Concept

Believes in own capabilities and judgment.

25.01 **Pride:** Takes pride in own expertise and in ability to handle situations.

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25.02 **Feedback:** Actively seeks and accepts feedback for improvement without loss of self-esteem and without responding defensively.

25.03 **Assertive:** Demonstrates assertiveness as an advocate for professional standards and for participants and their needs.

26.00 Self-Control

Maintains emotional equilibrium and optimism.

26.01 **Self-discipline:** Maintains self-control in high stress situations.

26.02 **Checks Behavior:** Controls impulses to do or say inappropriate things.

26.03 **Self-Monitors:** Monitors own personal values and biases so they do not undermine objectivity and professionalism.

26.04 **Patience:** Shows patience and perseverance in working for desired results.

27.00 Flexibility

Demonstrates ability to respond to challenge and change.

27.01 **Stress Reduction:** Controls own stress; finds ways, such as humor, to reduce or manage it.

27.02 **Coping Skills:** Perseveres in the face of ambiguity, disappointment, hostility, or adverse conditions; resists dwelling on disappointments; motivates self to make the best of things.

27.03 **Openness:** Is open to new information and to changing own opinions.

27.04 **Flexibility:** Is able to shift gears and redirect activities.

27.05 **Role Versatility:** Is able to adjust own behavior in order to be effective within and among groups and individuals.

28.00 Job Commitment

Demonstrates commitment to the role and responsibilities of a training program designer.

28.01 **Enthusiasm:** Shows enthusiasm for teaching and learning and sees self as a role model for participants.

28.02 **Responsibility:** Takes responsibility for projecting and maintaining a professional image for the sponsoring unit or organization.

28.03 **Follow-Through:** Demonstrates willingness to solve problems and see things through to completion.

28.04 **Sets Standards:** Sets high standards for self and for participants.

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- 28.05 **Initiative:** Takes initiative to correct problems, meet new needs, or address unexpected developments.
- 28.06 **Focuses on Goals:** Sets challenging yet achievable goals for self and stays focused on larger goals and what must be done to achieve them.
- 28.07 **Indicators:** Uses a variety of indicators to gauge success in achieving objectives.

29.00 Professional Standards/Ethics

Conducts self in an ethical and honest manner.

- 29.01 **Legal Issues:** Complies with all copyright laws and the laws and regulations governing the position.
- 29.02 **Ethics and Confidentiality:** Maintains confidentiality and integrity in the practice of the profession, demonstrating ethical behavior and understanding the implications of this responsibility.
- 29.03 **Professional Conduct:** Supports peers and avoids conduct that impedes the practicing of his/her profession.
- 29.04 **Public Service:** Improves public understanding of human resource development and management.
- 29.05 **Accurate Representation:** Fairly and accurately represents credentials, qualifications, experience, and abilities.

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**ASSESSMENT INSTRUMENT FOR
TRAINING PROGRAM AND CURRICULUM DESIGNER COMPETENCIES**

The following rating scale may be used as an individual assessment tool. After rating the individual on the degree to which he/she possesses each competency, the instrument can function as a guide in the following areas: hiring, professional development, performance appraisal, and training of trainers.

Individual Demonstrates the Competency

1 2 3
Low Moderate High

ADMINISTRATION

1.00 **Human Service Policy and Framework** – *Ability to demonstrate understanding of human services policy and laws.*

01.01 Human Services Philosophy and History _____

01.02 Human Services Field Understanding _____

01.03 Federal, State Laws and Regulations _____

2.00 **Organizational Ability** – *Ability to demonstrate organizational skills.*

02.01 Work Management _____

02.02 Work Assignments _____

02.03 Work Organization _____

3.00 **Project Planning** – *Ability to demonstrate understanding of project planning.*

03.01 Project Management Process _____

03.02 Planning Steps _____

03.03 Goal Implementation _____

03.04 Impact Assessment _____

COMMUNICATION

4.00 **Interpersonal Communication** – *Ability to demonstrate effective interpersonal communication.*

04.01 Expectations _____

04.02 Clear Explanations _____

04.03 Probing Techniques _____

04.04 Feedback _____

04.05 Modeling _____

04.06 Listening Skills _____

5.00 **Non-Verbal Communication** – *Ability to demonstrate effective non-verbal communication behavior.*

05.01 Eye Contact _____

05.02 Appropriate Behavior _____

6.00 **Writing Skills** – *Ability to communicate effectively in writing.*

06.01 Writing Skills _____

06.02 Writing Level _____

7.00 **Cultural Sensitivity** – *Ability to demonstrate effective cross-cultural communication techniques.*

07.01 Cross Cultural Diversity _____

07.02 Cross-Cultural Sensitivity _____

07.03 Cross Cultural Content _____

07.04 Cross Cultural Discussion _____

07.05 Managing Conflict _____

CONCEPTUAL KNOWLEDGE/SKILLS

8.00 **Problem Analysis** – *Ability to clarify issues by breaking them down into meaningful components.*

08.01 Identifying Elements _____

08.02 Approaches _____

08.03 Analysis _____

9.00 **Judgment** – *Ability to demonstrate sound judgment.*

9.01 Using Information _____

9.02 Balance _____

9.03 Priorities _____

9.04 Objectivity _____

10.00 **Conceptual Thinking** – *Ability to see patterns and synthesize related items.*

10.01 Intellectual Versatility _____

10.02 Using Frameworks and Experience _____

10.03 Past Experience _____

10.04 Systems View _____

10.05 Creative Thinking _____

CURRICULUM DESIGN

11.00 **Preparation for Learning** – *Ability to engage participants and/or supervisors prior to the learning activity.*

11.01 Needs Assessment _____

11.02 Participant Engagement _____

11.03 Supervisor Engagement _____

Training Program and Curriculum Designer Competency Model

11.04 Reinforcement of Learning _____

12.00 **Instructional Design Strategies** – *Ability to design training programs and curriculum.*

12.01 Research _____

12.02 Lesson Objectives _____

12.03 Training and Development Techniques _____

12.04 Information Flow _____

12.05 Modes of Expression _____

12.06 Uniform Format and Methodology _____

12.07 Competency-based Approaches _____

13.00 **Development of Materials** – *Ability to develop a variety of learning materials.*

13.01 Range of Techniques _____

13.02 Curriculum guides _____

13.03 Instructional packages _____

13.04 Scripts _____

13.05 Experiential exercises _____

13.06 Performance Aids _____

13.07 Questioning _____

13.08 Job-Relevant _____

GROUP DYNAMICS CLUSTER

14.00 **Interpersonal Understanding** – *Ability to demonstrate interpersonal understanding.*

14.01 Valuing Participants _____

14.02 Empathy _____

14.03 Feedback _____

Training Program and Curriculum Designer Competency Model

14.04 Genuineness _____

15.00 **Managing Process** – *Ability to manage group process including conflict and difficult situations.*

15.01 Managing Conflict _____

15.02 Maintains Focus _____

15.03 Difficult Situations _____

16.00 **Group Climate** – *Ability to establish and maintain an effective group climate.*

16.01 Ground Rules _____

16.02 Group Decision Making _____

16.03 Buy-in/Advocacy _____

16.04 Environment _____

16.05 Confidentiality _____

INFORMATION MANAGEMENT

17.00 **Knowledge Management** – *Ability to develop and implement systems for creating, managing, and distributing information.*

17.01 Library Skills _____

17.02 Resource Skills _____

18.00 **Computer Skills** – *Ability to apply basic computer concepts, utilizing e-mail, scheduling, word processing, and presentation software.*

18.01 Computer Basics _____

18.02 E-Mail _____

18.03 Scheduling _____

18.04 Word processing _____

18.05 Presentation Software _____

INSTRUCTIONAL MANAGEMENT CLUSTER

19.00 **Assessment and Transfer** – *Ability to assess learner performance and promote transfer of meaning.*

19.01 Transfer of Learning _____

19.02 Evaluation of Participants _____

19.03 Live Training Evaluation _____

19.04 Formative Evaluation _____

LEARNING THEORY

20.00 **Learning and Human Development** – *Ability to apply understanding of how adults learn.*

20.01 Learning Theory _____

20.02 Contexts for Learning _____

20.03 Self-Directed Learning _____

20.04 Personal/Learning Styles _____

21.00 **Learning Climate** – *Ability to create a positive learning climate.*

21.01 Positive Climate _____

21.02 Motivation _____

21.03 Accelerated Learning _____

LOGISTICS

22.00 **Audio-Visual and Multimedia Aids** – *Ability to utilize audio-visual multimedia aids.*

22.01 Multi-Media Resources and Technology _____

22.02 Application _____

22.03 Presentation Methods _____

23.00 **Distance Learning** – *Ability to utilize distance learning.*

23.01 Instructional Methodology _____

23.02 Instructional Media _____

23.03 Instructional Approaches _____

SELF-MANAGEMENT SKILLS

24.00 **Self-Responsibility** – *Engages in ongoing learning to improve professional capabilities.*

24.01 Self-Awareness _____

24.02 Reflective Practice _____

24.03 Relationship Building _____

24.04 Professional Growth _____

24.05 Knowledge of Field _____

25.00 **Self-Concept** – *Believes in own capabilities and judgment.*

25.01 Pride _____

25.02 Feedback _____

25.03 Assertive _____

26.00 **Self-Control** – *Maintains emotional equilibrium and optimism.*

26.01 Self-discipline _____

26.02 Checks Behavior _____

26.03 Self-Monitors _____

27.00 **Flexibility** – *Demonstrates ability to respond to challenge and change.*

Training Program and Curriculum Designer Competency Model

- 27.01 Stress Reduction _____
- 27.02 Coping Skills _____
- 27.03 Openness _____
- 27.04 Flexibility _____
- 27.05 Role Versatility _____

- 28.00 **Job Commitment** – *Demonstrates commitment to the role and responsibilities of a training program designer.*
- 28.01 Enthusiasm _____
- 28.02 Responsibility _____
- 28.03 Follow-Through _____
- 28.04 Sets Standards _____
- 28.05 Initiative _____
- 28.06 Focuses on Goals _____
- 28.07 Indicators _____

- 29.00 **Professional Standards/Ethics** – *Conducts self in an ethical and honest manner.*
- 29.01 Legal Issues _____
- 29.02 Ethics and Confidentiality _____
- 29.03 Professional Conduct _____
- 29.04 Public Service _____
- 29.05 Accurate Representation _____