



COMPETENCIES FOR PERFORMANCE AND LEARNING PROFESSIONALS®

ABRIDGED PREVIEW EDITION



THE INSTITUTE
FOR PERFORMANCE
AND LEARNING

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Foreword

About this edition

The Institute for Performance and Learning - Canada's professional association focused on learning and performance in the workplace - enthusiastically shares this abridged edition of the *Competencies for Performance and Learning Professionals* with you as a preview of how the competencies can be used by performance and learning professionals.

A full version of the Competencies that includes the underlying skills, typical key outputs and assessment criteria is available free to members, and may be purchased via the Institute website.

About **performance and learning professionals**: We work in all provinces and industries in Canada—in corporations, government agencies, and nonprofit organizations. Professionals in this field can also assume a variety of roles: administrators (who oversee the running of learning and development groups), instructors, instructional designers (who design and develop learning experiences in a variety of media), project managers (who oversee large training efforts), curriculum planners, managers, relationship managers or learning consultants (who assess a situation and suggest whether or not learning can address it, and serve as a bridge between business leaders and the learning function within an organization), and evaluators (who assess the effectiveness of learning experiences).

Despite this diversity of work environments and roles, there are remarkable similarities in competent performance across roles. These Competencies try to capture these similarities. That's a challenge because no single professional uses all of these competencies every day and many specialize in a subset of them.

Use the Competencies to help guide your professional development at each phase of your career:

- **Thinking about a career in performance and learning?** Use the Competencies to discover the breadth of effective, competent performance. You can use the Competencies to decide, "Would I like to do this kind of work?" If you decide yes, use the Competencies to consider, "Which aspect of this work interests me most?"
- **Just starting a career in performance and learning?** The Competencies provide a roadmap for professional development. You might start by developing a general familiarity with all of the competencies and developing expertise in one or more of the seven competency categories:
 - Partnering with clients
 - Assessing performance needs
 - Designing curricula
 - Designing learning experiences
 - Facilitating learning
 - Supporting transfer of learning
 - Evaluating learning
- **Already built up some experience in the field?** You might consider strengthening your competency in one or more of these seven competency categories, or developing expertise in more specialized competencies within those categories, such as design thinking, web development or project management.
- **Managing performance and learning professionals or thinking about doing so?** You might consider using the Competencies to guide you in writing job descriptions and performance plans for your staff, and as a basis for evaluating their performance.
- **Responsible for post-secondary educational programs in the area of workplace performance and learning?** You might consider planning curricula in alignment with the competencies.
- **Seeking external recognition of your expertise in the field?** You might consider certification. The competencies named in the *Competencies for Performance and Learning Professionals* form the basis of the certification process offered by the Institute. For more information on requirements for certification, visit the Certification page on the Institute's website.

Foreword cont'd

The *Competencies for Performance and Learning Professionals* represent the collective wisdom of scores of dedicated professionals who have contributed to this document since the first edition was published in 1976. Then known as *Competency Analysis for Trainers: A Personal Planning Guide* (CAT), and published by the Ontario Society for Training and Development (OSTD), the CAT served a similar need to the current document: a response to the needs of practitioners seeking recognition for their professional competencies and achievement. At that time, OSTD offered a Professional Development Accreditation Program (PDAP), a self-assessment and peer-reviewed program designed to provide an inventory of knowledge and skills, an indication of development needs, and recognition of professional development with Certificates of Achievement at the Basic, Intermediate, and Advanced levels. OSTD published a revised version of the document in 1987, under the title, *Competency Analysis for Trainers: A Professional Assessment and Development Guide*.

In an effort to further strengthen the *Competency Analysis for Trainers* and in conjunction with the launch of a more formal certification program, OSTD published the next edition in 1995. This more comprehensive resource, the *Training Competency Architecture* (TCA) and companion *Training Competency Architecture Toolkit*, identified the competencies and established the criteria for competent performance within five major competency categories: analyzing performance/training needs, designing training, facilitating/instructing, evaluating training, and coaching the application of training. The Competencies served as the basis of the Certified Training and Development Professional (CTDP) designation, which OSTD introduced in the same year. The TCA was revised again in 2001. Two years later, OSTD expanded its mission to serve all of Canada and became the Canadian Society for Training and Development (CSTD).

Recognizing, too, that the everyday practice of training and development continued to evolve in response to new technologies for learning and changing economic conditions, CSTD initiated its next periodic revision to the TCA in 2008, resulting in the 2010 publication, *Competencies for Training and Development Professionals*, a streamlined publication (just one-third the length of the earlier edition) representing a significant update to all the competencies. This more accessible version was very well-received by our members, and made the *Globe and Mail's* Top 10 Books for Business and remained over the next several years.

In 2015, CSTD became the Institute for Performance and Learning in recognition of an evolving profession. At the same time, the Institute launched its next periodic review of its certification programs. Over the course of 15 months, the Advisory Committee consulted with members and reviewed other similar certification programs. The result is this latest version of the competencies plus the transition from a certification process that included a knowledge exam and skill demonstration to a process that involves the presentation of a portfolio of actual work samples.

This work builds on the voluntary contributions of many performance and learning professionals who participated in the development of the previous editions. The Acknowledgements section attempts to identify all of these contributors. I hope you'll take a moment to read their names and join the Institute for Performance and Learning and me in thanking them for making this publication possible.

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About The Institute for Performance and Learning

Founded in 1946 as the Ontario Society for Training and Development, the Institute for Performance and Learning is Canada's only national member association for workplace performance and learning professionals, and is an internationally recognized thought-leader.

The mission of the Institute is to:

1. foster innovation through relevant and effective professional development experiences, a national awards program and research;
2. promote the value of the profession to business leaders, government and those seeking a dynamic 21st century career; and
3. set the competency and ethical standards for workplace performance and learning professionals.

About Certification

Launched in 1976, the Institute's Certification Program is the oldest of its kind in North America. The Institute sets the standard for workplace performance and learning professionals in Canada through a competency framework and a code of ethics. The Institute's Certification Program has been developed in accordance with standards set by the International Standards Association.

For more information, contact:
The Institute for Performance and Learning
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www.performanceandlearning.ca

Introduction

In this introduction, we clarify the purpose of the *Competencies for Performance and Learning Professionals*, define key terms, and suggest how the *Competencies* can be used.

Purpose

The Institute for Performance and Learning has developed the *Competencies for Performance and Learning Professionals* to:

- present a clear picture of competent performance, based on generally accepted practice;
- promote effective learning that produce results for participants and their organizations;
- enhance the credibility, respect, and professional status of people working in the performance and learning field;
- provide a framework for the design of curricula and the design and development of specific learning experiences;
- recognize that our practice is not an exact science and the focus for competent performance in this field should be on the practical application of generally accepted best practices as informed by evidence-based research;
- provide a foundation for certification of performance and learning professionals; and
- enhance the credibility, respect, and professional status of people working in the performance and learning “field”.

Key Terms

Competencies

Competencies refer to clusters of interrelated knowledge, skills, attitudes, and values necessary for performing effectively in a particular area.

Performance

“Performance” is the accomplishment of a worthy goal. At their core, performance and learning solutions support individuals in accomplishing worthy goals by helping them develop the skills, knowledge, and attitudes needed, as well as ensuring they have the resources required to perform these skills, and the balance of consequences supports performance.

When many individuals strengthen their individual performance, the organization that sponsored the learning or other performance solution realizes a broader goal of its own and achieving that ideally has an impact on its overall results.

Designing Curricula

Refers to the framework for a set of interrelated learning experiences and accompanying materials that are intended to build capability over the medium to longer term – often several months or years and among a variety of audiences – that may take different paths through the curriculum.

Designing Learning Experiences

Refers to specific learning experiences (such as a video, an elearning course, or a virtual or face-to-face workshop) that develop performance with a well-defined audience over a brief period of time (such as minutes, hours, or days).

Introduction cont'd

Key Terms cont'd

Clients	Refers to the specific individual, outside of the performance and learning group or organization, who contracts for the work. The client is the primary contact in the group requesting the learning or other performance solutions.
Stakeholders	A more general term that refers to all those who have a vested interest (or stake) in the outcome of a performance and learning project. Typical stakeholders include learners, their managers and others in the client's organization.
Sponsors	Refers to the person paying for the work: that is, they can authorize or stop payment for a project. This is usually a senior executive with whom the performance and learning team has limited interaction.
Subject Matter Experts (SMEs)	Refers to those who contribute ideas and review drafts of materials because of their knowledge, skills, and experience related to the desired performance outcomes.

Using the Competencies

You can use the *Competencies for Performance and Learning Professionals* in a variety of ways:

As an individual contributor:

- assess your own performance to identify specific opportunities to strengthen your skills and ensure you provide a competent level of service to internal or external clients; and
- prepare to demonstrate your professional competence through certification.

As a manager or supervisor:

- design or define responsibilities for a job or position as a performance and learning professional; and
- manage a team engaged in performance and learning; assign work to them and assess their work performance.

All roles:

- Manage your career in the field.

When using the *Competencies* for these purposes, note that they only define effective performance, not “how to” achieve it. For example, we do not tell you how to perform competencies, such as conduct a task analysis, or use virtual classroom tools.

This document identifies key, core competencies for the profession; it is not exhaustive, nor does it address competencies needed in only one or two performance and learning roles.

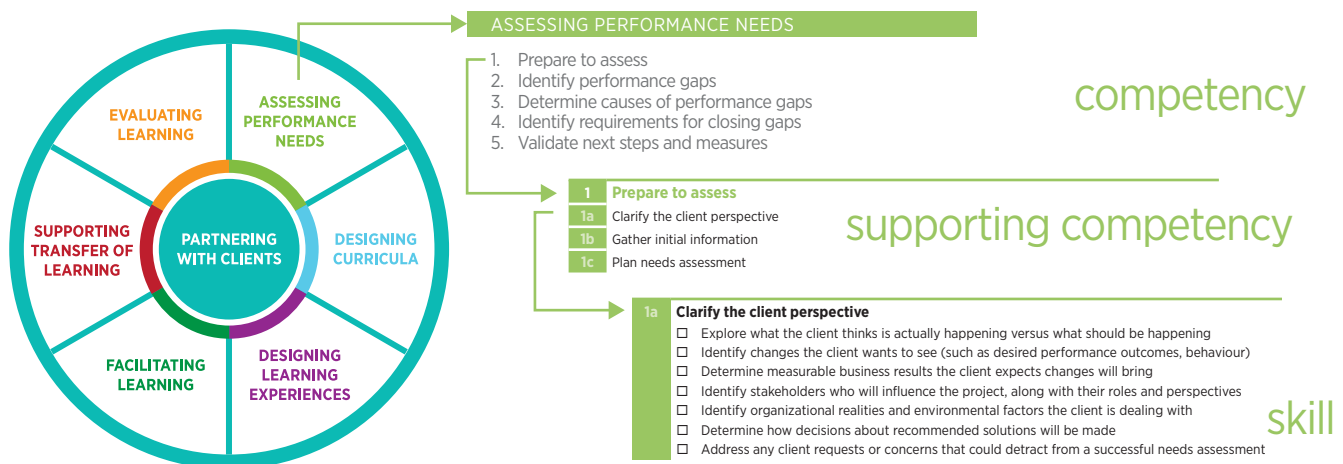
To learn how to master these core competencies, explore the many professional development opportunities offered by the Institute, continuing education, and college and university programs that are listed on the Institute's website.

Overall structure

The competencies are organized in seven categories: *Partnering with clients*, *Assessing performance needs*, *Designing curricula*, *Designing learning experiences*, *Facilitating learning*, *Supporting the transfer of learning* and *Evaluating learning*.

Within each category, we identify the competencies, supporting competencies, and skills. See below for an example using *Assessing performance needs*.

The full set of skills is available in the member edition of The Competencies.



What's in each category

Each of the seven competency categories is structured the same way, as illustrated below. The full set of skills, key outputs and assessment criteria is available in the member edition of The Competencies.

Designing learning experiences-1

Designing learning experiences

Introduction

Designing learning experiences can range from creating a 15-minute elearning self-paced tutorial on using a new software application, to setting up a social platform for employees to learn from each other. Content can range from highly technical skills, to skills like project management or sales, to "softer" skills like communication.

Designing learning experiences is also referred to as "instructional design" and "training design and development". Traditionally, people who design learning experiences have been referred to as "instructional designers".

Competent design of learning experiences ensures:

- learning objectives support desired performance outcomes and business measures;

The first page introduces the competency category. The introduction describes the overall purpose, terminology, importance of the category, and other considerations.

Designing learning experiences-3

Designing learning experiences

Competencies and supporting competencies

You'll find information about the importance of mastering the competencies, skills for each supporting competency, key outputs, and assessment criteria on the following pages.

1	Conduct design analysis
1a	Confirm learning will address the identified performance gap(s)
1b	Determine context requirements for learning
1c	Research subject matter
1d	Conduct task (instructional) analysis

The second page provides an overview of the competencies and supporting competencies. Performance and learning professionals need to be proficient at all supporting competencies to be fully proficient at the competency level. The competencies are designated with a number, and the supporting competencies are designated with a number and letter.

Designing learning experiences-5

1 Conduct design analysis

Importance

The impact of mastering these competencies is you:

- ensure the learning solution will address performance gaps;
- design the learning based on desired performance outcomes;
- design a learning experience suited to the learners and their work environment; and
- have a realistic, manageable plan for the development of the learning experience.

The subsequent pages (available in the full member edition) describe the importance of each supporting competency and list the underlying skills. The skills are designated with a check box. Performance and learning professionals need to be proficient at all skills to be fully competent in the supporting competency.

Designing learning experiences-7

1 Conduct design analysis

Supporting com

These skills (with check

1a	Confirm learn
☐	Review need
☐	Review job
☐	Confirm pe
☐	Confirm pri
☐	Confirm tar

Key outputs and assessment criteria

Mastering these competencies typically involves the following outputs. The assessment criteria indicate what would make the output appear to be high quality.

Key Outputs	Assessment Criteria
Desired performance outcome(s) and performance gap(s)	- Analysis acknowledges any assessment of performance needs already conducted - Gap between current and desired performance outcomes is clear - Gap is stated in terms of specific performance outcomes - Analysis confirms that performance gap(s) can be addressed through a learning solution and related transfer activities

The subsequent pages also identify typical outputs and the assessment criteria for these outputs (available in the full member edition).

Professional development

There are many ways you can use the *Competencies for Performance and Learning Professionals* to support your growth.

Your growth as a performance and learning professional continues throughout your career. With experience, many professionals expand their roles and, in the process, master additional competencies. For example, you may start your career as a facilitator, then become a designer of learning experiences. Later, you might move to the complex field of assessing performance needs or become a leader of the learning function within an organization. Although familiarity with the other roles is essential throughout your career, you need to master the competencies for the new role with each transition.

Here are some ways you can use the *Competencies for Training and Development Professionals* to support your growth.

Self-assessment	Assess your current skill and knowledge against the Competencies. Assess the outputs you produce against the Assessment Criteria.
Reading	Read classic and current books, articles, and websites, using the Competencies as a guide. See the selected bibliography for a list of books to get you started, or visit the Institute website for a list of research articles and resources (www.performanceandlearning.ca).
Courses	Participate in specific Institute, college, university or other programs that are mapped to these competencies. Visit the Institute's website for a list of programs (www.performanceandlearning.ca).
Guided observation	Watch skilled practitioners in action, using the Competencies as a checklist of criteria for successful performance. Review the products of other people's work, using the Competencies as a checklist of criteria for successful performance.
Guided practice	Have a colleague observe or review your work and provide feedback, using the Competencies as a checklist of criteria for successful performance.
Demonstration of mastery	Have a competent practitioner assess your performance against the Competencies. One way to do this is by completing your CTDP certification. Visit the Institute's website for more information (www.performanceandlearning.ca).

Competencies for Performance and Learning Professionals



PARTNERING WITH CLIENTS

1. Demonstrate awareness of client organization
2. Support clients in making effective choices
3. Develop agreements with clients
4. Manage changes throughout a project
5. Interact effectively



ASSESSING PERFORMANCE NEEDS

1. Prepare to assess
2. Identify performance gaps
3. Determine causes of performance gaps
4. Identify requirements for closing gaps
5. Validate next steps and measures



DESIGNING CURRICULA

1. Identify goals, principles and constraints
2. Create preliminary roadmap for curriculum
3. Design detailed roadmap for curriculum
4. Prototype curriculum components
5. Prepare to implement and sustain curriculum



DESIGNING LEARNING EXPERIENCES

1. Conduct design analysis
2. Establish learning objectives and evaluation
3. Create detailed design
4. Develop materials
5. Support implementation



FACILITATING LEARNING

1. Prepare to facilitate
2. Create learning environment
3. Engage learners
4. Foster learning
5. Assess learning



SUPPORTING TRANSFER OF LEARNING

1. Design transfer of learning
2. Implement support for transfer of learning



EVALUATING LEARNING

1. Evaluate learner reaction
2. Evaluate learning objectives
3. Evaluate transfer of learning
4. Evaluate business results

Partnering with clients

Introduction

Partnering with clients is central to each of the other six competency categories, since all your work as a performance and learning professional is client-focused, whether you're internal or external to the organization.

We've organized the *Partnering with clients* competency category in five competencies: Demonstrate awareness of client organization, Support clients in making effective choices, Develop agreements with clients, Manage changes throughout a project, and Interact effectively– all related to effective communication.

The specific *Partnering with clients* competencies you need may vary with your role and the project.

Whether you are internal to an organization or an external service provider, you will have clients - people to whom you provide a service - and the competencies in this category will apply.

To ensure clarity, we have defined terms used in this section as follows:

- Your **client** is the principal individual to whom you provide your solution. Typically, a client has day-to-day sign-off authority. A client differs from the **sponsor**, who funds the project and has ultimate or final sign-off authority, although sometimes the same individual will play both roles. Performance and learning professionals use the terms client and sponsor whether they work internally or externally.
- Your client is just one of your **stakeholders**, or individuals who have an interest or concern in the solution. Your stakeholders also include the sponsor and learners, and may include a multitude of other individuals and groups, such as business or organization representatives, unions, suppliers, and health and safety committees.

Competent partnering with clients increases the likelihood you:

- get the input you need to achieve or exceed expectations on an assignment;
- expand your client's and your own thinking about effective and innovative solutions;
- meet the needs of both the learner and the organization sponsoring the project;
- minimize misunderstandings, surprises and disappointments by anyone on the project;
- build commitment to effective implementation of solutions;
- complete projects on time and within budget; and
- maintain client satisfaction throughout the project.

Since other professional associations have detailed project management competencies, we have included only a few project management competencies, such as Managing changes throughout a project, that are particularly relevant for performance and learning professionals.

Partnering with clients

Competencies and supporting competencies

You'll find information about the importance of mastering the competencies, skills for each supporting competency, key outputs, and assessment criteria on the following pages.

1 Demonstrate awareness of client organization

- 1a Demonstrate awareness of the vision, values, strategic direction of organization/work unit
- 1b Demonstrate knowledge of how work gets done in client organization/work unit
- 1c Demonstrate knowledge of client organization/work unit culture

2 Support clients in making effective choices

- 2a Propose solutions based on foundational and evolving best practices
- 2b Consider a range of options
- 2c Support stakeholders in promoting solutions within organization

3 Develop agreements with clients

- 3a Clarify client expectations regarding a project
- 3b Gather information about previous similar projects
- 3c Clarify roles of client, learners, other stakeholders, and performance and learning professional(s)
- 3d Negotiate assumptions and deliverables, as well as level of quality, timing, and cost

4 Manage changes throughout a project

- 4a Develop realistic project plans
- 4b Keep projects on track
- 4c Negotiate changes in scope

5 Interact effectively

- 5a Seek input from client, learners, and other stakeholders
- 5b Present information and concepts clearly and succinctly
- 5c Manage differences of opinion among stakeholders
- 5d Act as an ambassador for your group

Assessing performance needs

Introduction

Assessing performance needs can range from a designer taking a few hours to clarify what learners should be able to do after a learning experience, to an experienced performance and learning professional taking weeks to conduct a needs assessment of a complex performance issue that involves many work processes, functions, and roles.

Performance refers to behaviours that produce measurable results and that indicate progress towards – or achievement of – an important outcome. Performance at the individual level depends on clear expectations, meaningful feedback, and having the resources, skills and knowledge, plus motivation to perform.

Since learning solutions can address the skill, knowledge, and attitude components of performance, performance and learning professionals may need to assess performance needs in response to a request for a learning solution. They do this to determine whether another performance solution is required instead of, or in addition to, a learning solution.

Other performance solutions could include clarifying expectations, providing timely feedback, improving equipment, improving processes, or providing incentives.

People often use the terms “assessing” and “analyzing” performance needs interchangeably. Strictly speaking, a needs analysis, also called a cause analysis, is just the part of *Assessing performance needs* where you determine what is causing or contributing to specific performance gaps. *Assessing performance needs* includes a number of additional steps, including identification of performance gaps and solutions for closing those gaps.

Competent assessment of performance needs ensures:

- the facts support any assumptions;
- you address the right problem(s) and cause(s);
- you don't jump to a learning solution;
- you identify the best solution or blend of solutions; and
- you determine how to evaluate results.

Assessing performance needs is the most complex of the competency categories. It's complex because, in addition to the key competencies outlined in the following pages, successful analysis also involves a number of other, inter-related competencies. These include the competencies from *Partnering with clients*: Demonstrate awareness of client organization, Support clients in making effective choices, Develop agreements with clients, Manage changes throughout a project, and Interact effectively. Other competencies include: adaptability, agility, analytical thinking, systems thinking, design thinking, conceptual thinking, dealing with ambiguity, and synthesis of disparate facts into a coherent whole.

If you have not already developed these additional competencies, we recommend you seek assistance when undertaking your first few complex needs assessments.

Assessing performance needs is different from process improvement, where the primary focus is on making work procedures more efficient and effective, and from organization development, where the primary focus is on strengthening the functioning of groups.

You can assess performance needs at the job (individual or team), process, and organization level. The primary focus in the *Assessing performance needs* competencies is the job level. However, you also consider the process and organization levels when determining the causes of performance gaps and solutions for closing gaps.

Assessing performance needs

Competencies and supporting competencies

You'll find information about the importance of mastering the competencies, skills for each supporting competency, key outputs, and assessment criteria on the following pages.

1	Prepare to assess
1a	Clarify the client perspective
1b	Gather initial information
1c	Plan needs assessment
2	Identify performance gaps
2a	Gather data to determine current and desired performance outcomes
2b	Conduct job, competency, or goal analysis to determine desired performance outcomes
2c	Determine performance gaps and opportunities for improving performance
2d	Identify desired performance outcomes and business measures
3	Determine causes of performance gaps
3a	Determine job level causes
3b	Determine process level causes
3c	Determine organization level causes
4	Identify requirements for closing gaps
4a	Identify potential solutions for closing performance gaps
4b	Select learning and other performance solutions
4c	Plan to support transfer of learning and sustained performance
4d	Plan to evaluate transfer of learning and business results for learning solutions
5	Validate next steps and measures
5a	Prepare needs assessment report
5b	Present report to client
5c	Secure sign-off and support for recommended solutions

Designing curricula

Introduction

Designing curricula refers to the design of frameworks or overall structures for sets of interrelated learning experiences and materials intended to build competence for many groups of learners, over several months or years. An effective curriculum is more than a collection of courses – the components might range from face-to-face or virtual courses to other experiences, such as structured observation and practice, internships and job rotations, to informational materials such as guidebooks and job aids. An effective curriculum is also more than the sum of its parts. Curriculum design requires approaching learning as an overall system with the various components working together to develop performance.

Designing a curriculum is important to do when:

- people need to learn a body of knowledge or gain a comprehensive set of skills or competencies;
- the subject matter underlying an industry or line of work changes substantially (such as the digitization of an industry);
- a number of individuals or cohorts are hired for a role;
- an existing role is changing significantly or new products and services are being launched; and
- the learning path to progress from one career or job level to the next, or to maintain currency in a profession, needs to be defined.

A curriculum is often presented as a visual ‘roadmap’ showing one or more paths to progress through the learning. The roadmap shows the linkages among the curriculum’s various components, from business measures to performance and other outcomes, learning objectives, related learning activities, and evaluation.

The **performance outcomes** describe what people need to do in the ‘real world’. The **other outcomes** address broader issues of personal and professional development that can be harder to describe in observable and measurable terms, such as “develop a professional identity” or “become a champion for the product line”. These other outcomes are developed by going through the curriculum and play an important role in the overall success. Performance and other outcomes differ from **learning objectives**, which describe what people do while learning and usually apply to just one component of the curriculum.

Competent design of a curriculum ensures:

- performance outcomes are sequenced so learners can perform specific tasks on-the-job as soon as possible;
- other outcomes (such as personal development or acculturation) are identified and integrated where feasible;
- affective, cognitive, and psychomotor learning are effectively integrated;
- learning is sequenced to optimize retention;
- learning happens through the most effective formats and channels for the organization and learners;
- learners with different knowledge, skills, experience, needs, or goals can take personalized paths through the curriculum;
- there’s a clear progression through the curriculum and across job levels, where applicable;
- various components of the curriculum are prototyped and tested before full-scale development of all the experiences and materials;
- efficiencies in developing experiences and materials are promoted by identifying potential reuse of components of the curriculum; and
- specification of guidelines, templates and similar resources promotes consistency during development.

Introduction cont'd

Many of the competencies included in the *Partnering with clients* competency category are particularly relevant when designing a curriculum. They include: Demonstrate familiarity with client organization, Support clients in making effective choices, Develop agreements with clients, Manage changes throughout a project, and Interact effectively. The competency of Support clients in making effective choices and, in particular, the supporting competency of Proposing solutions based on foundational and evolving best practices, are especially important in *Designing curricula*. For example, it's important to know about curriculum design patterns in performance and learning, about which technologies are available to support delivery of curricula, and about what current research shows about the retention of new knowledge and skills.

The decision to design a curriculum is usually the result of a preliminary assessment of performance needs. However, identifying specific performance outcomes, which involves assessing performance needs in more detail, is also a pivotal task in designing a curriculum, so we include this as one of the initial competencies in this competency category.

Designing curricula is a complex process that requires extensive experience in *Assessing performance needs* and *Designing learning experiences*. For this reason, curriculum design is generally undertaken by accomplished performance and learning professionals.

Designing curricula

Competencies and supporting competencies

You'll find information about the importance of mastering the competencies, skills for each supporting competency, key outputs, and assessment criteria on the following pages.

1	Identify goals, principles, and constraints
1a	Consult with stakeholders to clarify business need and goals of curriculum
1b	Establish overall design principles
1c	Profile identified groups of learners
1d	Consider potential of available technology to support curriculum
1e	Identify interdependencies and constraints
2	Create preliminary roadmap for curriculum
2a	Identify desired performance and other outcomes
2b	Sequence performance and other outcomes
2c	Identify potential learning and other performance solutions for achieving desired outcomes
2d	Determine paths for identified groups of learners
2e	Determine how technology and tools can support the curriculum
3	Design detailed roadmap for curriculum
3a	Establish preliminary learning objectives for each curriculum component
3b	Clarify format for each curriculum component
3c	Determine delivery channel for each curriculum component
3d	Develop initial content inventory for curriculum
3e	Plan learning environment for curriculum
4	Prototype curriculum components
4a	Design at least one example of each curriculum component as a prototype
4b	Determine guidelines for ensuring consistency across subsequent design and development
4c	Develop templates based on the validated templates and guidelines
5	Prepare to implement and sustain curriculum
5a	Plan for implementation of curriculum
5b	Plan for validation of curriculum
5c	Plan for evaluating both the components and the curriculum as a whole
5d	Plan for maintaining curriculum

Designing learning experiences

Introduction

Designing learning experiences can range from creating a 15-minute elearning self-paced tutorial on using a new software application, to setting up a social platform for employees to learn from each other. Content can range from highly technical skills, to skills like project management or sales, to “softer” skills like communication.

Designing learning experiences is also referred to as “instructional design” and “training design and development”. Traditionally, people who design learning experiences have been referred to as “instructional designers”.

Competent design of learning experiences ensures:

- learning objectives support desired performance outcomes and business measures;
- content is focused on “need to know” versus “nice to know”;
- tasks are presented clearly and concisely;
- opportunities for practice are frequent and effective;
- materials support learning;
- learners can demonstrate new skills and knowledge;
- learning is transferred to and sustained in the workplace; and
- facilitators and learners are set up for success with well-designed learning experiences.

Designing learning experiences starts with a clear understanding of the business measures and desired performance outcomes. If this information is not available, it’s important to assess performance needs first. The performance needs assessment should confirm desired performance outcomes and business measures, identify the causes of any performance gaps, and determine whether a learning solution will help to close these gaps.

If you can’t confirm that a learning solution will help close identified performance gaps, as a performance and learning professional, you are obliged to advise the client that an investment in a learning solution might not pay off.

Because the design of learning experiences should be based on desired performance outcomes, you need an understanding of the competencies for *Assessing performance needs* to be an effective instructional designer. Because the design of classroom and virtual classroom learning experiences will be delivered by facilitators, you should also have an understanding of the competencies for *Facilitating learning*.

We have listed the design competencies in a linear order, but effective learning experiences are most often the result of an iterative design process involving successive prototypes that approximate the ultimate solution. This process includes iterative design (design analysis, learning objectives, and detailed design) and iterative development (development and validation of materials, and support implementation).

Competencies in the *Partnering with clients* category that are important in *Designing learning experiences* are: Demonstrate awareness of client organization, Support clients in making effective choices, Develop agreements with clients, Manage changes throughout a project, and Interact effectively.

In this competency category, we use the word ‘**storyboard**’ to represent the document that presents all the learning content in sequence, including mock-ups of each screen, narration, instructions for visuals, and programming instructions that tell developers how to program all buttons on the screen and respond to any input learners might enter.

Designing learning experiences

Competencies and supporting competencies

You'll find information about the importance of mastering the competencies, skills for each supporting competency, key outputs, and assessment criteria on the following pages.

1 Conduct design analysis

- 1a Confirm learning will address the identified performance gap(s)
- 1b Determine context requirements for learning
- 1c Research subject matter
- 1d Conduct task (instructional) analysis
- 1e Plan for designing learning

2 Establish learning objectives and evaluation

- 2a Write learning objectives
- 2b Design evaluation of learning objectives
- 2c Develop materials to evaluate learning objectives

3 Create detailed design

- 3a Prototype designs to get input from stakeholders
- 3b Determine delivery channel(s)
- 3c Create detailed outline for learning experience
- 3d Design support for transfer of learning and sustained performance
- 3e Prototype learning materials
- 3f Prototype digital interface
- 3g Conduct design walkthrough

4 Develop materials

- 4a Write or compile content for learner and instructor materials
- 4b Develop layout and visuals for learner and instructor materials
- 4c Develop storyboards
- 4d Manage review and revision cycles with stakeholders, including SMEs
- 4e Produce web-based learning
- 4f Develop materials to support transfer of learning and sustained performance
- 4g Develop materials to evaluate learner reaction
- 4h Develop materials to evaluate transfer of learning
- 4i Validate learning design and materials

Competencies and supporting competencies cont'd

5 Support implementation

- 5a** Manage publication and distribution of materials
- 5b** Prepare for implementation
- 5c** Prepare support for transfer of learning and sustained performance
- 5d** Plan for continuous improvement and maintenance

Facilitating learning

Introduction

Facilitating learning can range in scope from a small group gathered around equipment, to a meeting room with a few people, to a webinar with hundreds, even thousands, of participants. The content can be equally varied, from interpersonal skills to product knowledge to complex technical skills.

Competent facilitation of learning ensures:

- the environment is conducive to learning;
- learners are as engaged in learning as possible;
- learners are held accountable for their learning;
- opportunities to interact and practice are optimized;
- specific needs of individuals and groups are respected;
- achievement of learning objectives is assessed; and
- the facilitator appropriately represents the organization.

Many people begin their work as performance and learning professionals by facilitating learning. Facilitators often deliver learning experiences that were designed and developed by someone else, so, to be an effective facilitator, you need to be aware of the competencies for *Designing learning experiences*. For example, you need to be able to explain how learning objectives for the solution you are facilitating support desired performance outcomes, and how those outcomes affect business measures. You also need to see the link between learning activities, evaluation, and learning objectives.

If you are asked to facilitate learning that is not well-designed, it's important to let your client know your concerns and how they may have an impact on learning, performance, and results.

The competencies outlined in this category apply to *Facilitating learning*. They will not all apply to other types of facilitation, such as conducting strategic planning sessions, team building sessions, mediation, conflict resolution, or helping groups solve real-world problems.

Demonstrate awareness of client organization, one of the competencies in the *Partnering with clients* category, is important in *Facilitating learning*.

Facilitating learning

Competencies and supporting competencies

You'll find information about the importance of mastering the competencies, skills for each supporting competency, key outputs, and assessment criteria on the following pages.

1 Prepare to facilitate

- 1a Prepare to deliver the content and activities based on the design
- 1b Ensure learning experience supports desired performance outcomes
- 1c Coordinate logistics

2 Create learning environment

- 2a Establish physical or virtual learning environment
- 2b Address social and emotional needs of learners
- 2c Establish responsibilities for the success of learning experience
- 2d Model appropriate behaviour
- 2e Manage disruptive or counter-productive behaviour

3 Engage learners

- 3a Deliver content and instructions
- 3b Lead group discussions
- 3c Respond to learner questions and comments
- 3d Use differences and controversy to enhance learning
- 3e Optimize use of visual aids and equipment
- 3f Use virtual classroom tools

4 Foster learning

- 4a Demonstrate appropriate expertise
- 4b Facilitate individual and group activities
- 4c Facilitate to support transfer of learning and sustained performance

5 Assess learning

- 5a Confirm learners have prerequisite skills and knowledge before facilitation begins
- 5b Assess individual achievement of learning objectives

Supporting transfer of learning

Introduction

Supporting transfer of learning involves designing and promoting activities and materials that help learners apply what they learned during the learning intervention on the job. Activities may include reminder emails, feedback and coaching by a manager or mentor, video job aids, discussion forums, web-based tools, additional opportunities for practice, and recognition for changes in behaviour.

Supporting the transfer of learning increases the probability that learners will use the knowledge and skills they acquire through learning experiences in the workplace.

When designing transfer activities and materials, it is important to consider all the factors that support performance: clear expectations; specific and timely feedback; recognition and rewards; and the necessary information, tools and resources.

Competent support for transfer of learning ensures:

- considerations for transfer are addressed during the needs assessment phase;
- materials to support transfer are designed and developed;
- coaches and mentors are prepared to support transfer of learning; and
- facilitators or self-directed learning resources position content and activities to support the transfer of learning.

Supporting transfer of learning is actually addressed in previous competency categories. We have made it a separate category to highlight its importance.

Supporting transfer of learning

Competencies and supporting competencies

You'll find information about the importance of mastering the competencies, skills for each supporting competency, key outputs, and assessment criteria on the following pages.

1 Design for transfer of learning

- 1a** Plan to support transfer of learning and sustained performance
- 1b** Design support for transfer of learning and sustained performance
- 1c** Develop materials to support transfer of learning and sustained performance

2 Implement support for transfer of learning

- 2a** Prepare support for transfer of learning and sustained performance
- 2b** Facilitate to support transfer of learning and sustained performance

Evaluating learning

Introduction

Evaluating learning can take many forms, including surveys of learner reaction (sometimes called ‘smile sheets’), knowledge tests, skill demonstrations, comparisons of pre- and post-learning performance, and calculations of return on investment.

The overall purpose of evaluating learning is to determine the effectiveness of the learning and whether performance and business objectives have been met. This is sometimes called ‘summative’ evaluation. In the *Designing curricula* and *Designing learning experiences* categories, we focused on what is sometimes called ‘formative’ evaluation. We’ve called it ‘validation’.

Evaluating learning is an ongoing process that starts with *Assessing performance needs*, and continues through *Designing curricula* and *Designing learning experiences*, *Facilitating learning*, and *Supporting transfer of learning*.

A comprehensive evaluation of learning determines whether a learning solution has impacted business results. Business results are usually evaluated 6 to 12 months after implementation of the learning experience.

In order to determine that the learning solution has impacted business results, you must first assess the extent to which the learning has impacted performance outcomes on the job. Changes in performance outcomes are usually evaluated a few weeks to several months after implementation of the learning experience.

To ensure learners are adequately prepared to apply their learning on the job, you must assess whether learners have acquired the skills and knowledge required to perform on the job. This should be assessed against specific learning objectives during implementation of the learning experience.

To assess the learner’s reaction, you can have them evaluate their reaction during or immediately after implementation of the learning experience.

A commonly used framework for evaluating learning, developed by Donald Kirkpatrick, outlines four levels of evaluation. The competencies for *Evaluating learning* are related to Kirkpatrick’s four levels as shown below.

Kirkpatrick’s Four Levels of Evaluation	Evaluating Learning Competencies
1. Reaction	1. Evaluate learner reaction
2. Learning	2. Evaluate learning objectives
3. Behaviour	3. Evaluate transfer of learning
4. Results	4. Evaluate business results

Evaluating learning

Competencies and supporting competencies

You'll find information about the importance of mastering the competencies, skills for each supporting competency, key outputs, and assessment criteria on the following pages.

1 Evaluate learner reaction

- 1a Develop materials to evaluate learner reaction
- 1b Assess learner reaction
- 1c Recommend changes based on learner reaction

2 Evaluate learning objectives

- 2a Write learning objectives
- 2b Design evaluation of learning objectives
- 2c Develop materials to evaluate learning objectives
- 2d Assess individual achievement of learning objectives
- 2e Assess aggregate achievement of learning objectives
- 2f Recommend changes based on evaluation of learning objectives

3 Evaluate transfer of learning

- 3a Plan to evaluate transfer of learning
- 3b Identify desired performance outcomes
- 3c Develop materials to evaluate transfer of learning
- 3d Assess transfer of learning to the workplace
- 3e Recommend changes based on evaluation of transfer of learning

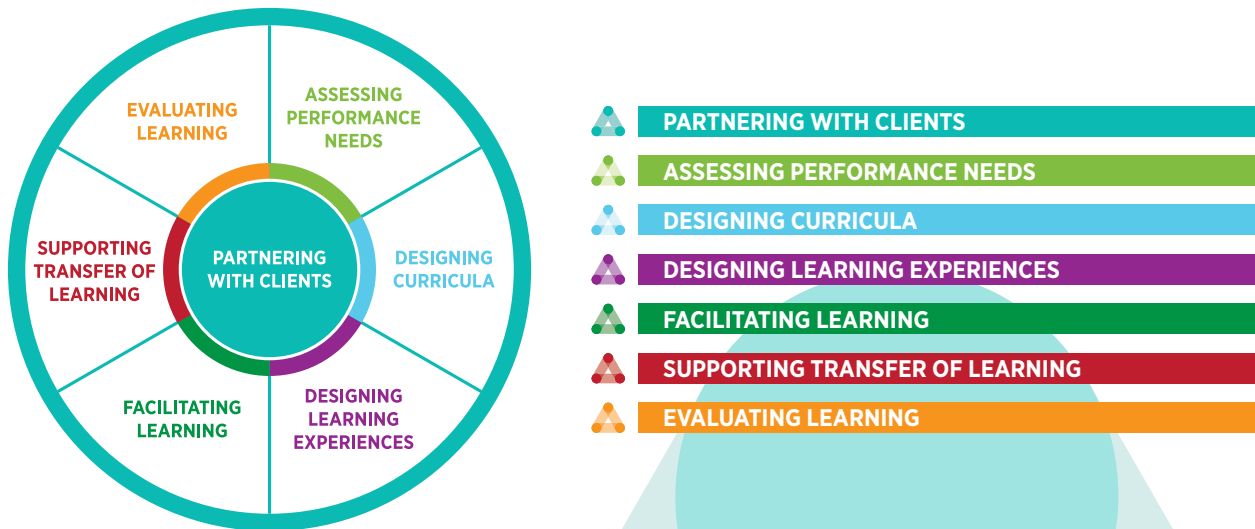
4 Evaluate business results

- 4a Plan to evaluate business results for learning solutions
- 4b Identify business measures
- 4c Assess business results
- 4d Recommend changes based on evaluation of business results

Competencies for Performance and Learning Professionals

Competencies for Performance and Learning Professionals is the desktop reference every performance and learning professional needs – it is both a guide to your personal professional development and the framework for the design and development of curricula and courses.

Competencies for Performance and Learning Professionals provides a summary of the knowledge you need to succeed in the learning profession. Discover a clear picture of competent performance and how you can achieve it with this indispensable tool.



Discover where the gaps in your knowledge might exist and reinforce what you already know with this publication by the Institute for Performance and Learning (formerly the Canadian Society for Training and Development – CSTD). Developed by senior practitioners and reviewed by a committee of experienced performance and learning professionals across a variety of fields including academia, the *Competencies for Performance and Learning Professionals* serves as the foundation for the Certified Training and Development Professional (CTDP) and Certified Training Practitioner (CTP) certificate programs.

The Institute for Performance and Learning is Canada's only professional association focused on training, learning and performance in the workplace. The organization's focus is to define the requisite body of knowledge and code of ethics for the profession, to develop the competencies of our members, and to promote and foster their collective reputation and image.

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