COMPETENCIES FOR PERFORMANCE AND LEARNING PROFESSIONALS©

Quick Reference

This quick reference guide illustrates The Institute for Performance and Learning's Competency Framework and how to use it within your organization. Refer to our full publication, Competencies for Training and Development Professionals© for details. performanceandlearning.ca/certification

The Competency Framework establishes the seven core competency areas critical to successful outcome:

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

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Partnering with clients

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.

Effective partnering ensures you get the input you need to meet the client's and the learners' needs. It can help expand your client's thinking, minimize misunderstandings, and build commitment. The specific *Partnering with clients* competencies you need may vary with your role and the project.

Here are some essential questions to help partner effectively:

1 Demonstrate awareness of client organization

1. What are the vision, values and goals of the organization and/or function?
2. How are decisions made? (such as speed of decision making, who is involved, who has authority, key influencers)
3. What language should be used or avoided?

2 Support clients in making effective choices

4. Which options best support the learner and the organization, in the long-term as well as short-term?
5. What data and examples will support your stakeholders in key meetings?

3 Develop agreements with clients

6. What are your expectations around the design and development process, and how we will work together?
7. What has worked well in the past?
8. What are the roles of the key client, learners, other stakeholders, and performance and learning professionals
9. What might impact the work we are doing together?

4 Manage changes throughout a project

10. Will the project plan enable us to meet the client expectations?
11. Are the resources available to deliver against the plan?
12. What happens when dependencies are delayed?
13. How will we manage delays, issues and scope changes?

5 Interact effectively

14. Who should provide input on the solution?
15. Who is the final decision-maker in case of differing opinions?

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Assessing performance needs

Assessing performance needs in response to a request for learning may result in both non-learning and learning interventions. When you assess needs, you may speak to key stakeholders, the executive and business lead or sponsor, and focus groups that represent the target audience.

Here are some essential questions to ask when assessing performance needs:

2 Identify performance gaps

1. What business/organization results do we want to achieve?
2. How will we evaluate those business/organization results? What are the leading indicators? How can we track them?
3. What tasks/activities do we want people to do – or do differently – after training? (desired performance outcome(s))
4. How will we evaluate the desired performance outcomes?
5. What are people doing now? How are they falling short of expectations – or will they fall short in the future? (performance gap(s))

3 Determine causes of performance gaps

6. At the job level, could any of the following be contributing to the performance gap?
   - Expectations that are unclear or seen as unrealistic
   - Feedback that is too late, too general or not provided
   - Tools and resources that are not timely, effective or efficient
   - Consequences that, on balance, do not support performance
   - Skills and knowledge of the performers, including skills for using technology
   - Ability of the performers
7. At the process level, could any of the following be contributing to the performance gap(s)?
   - Work processes or procedures that are too complicated to follow, inefficient or overlapping with other work areas
   - Technology or tools that do not perform as expected, or that users have difficulty using as intended
8. At the organization level, could any of the following be contributing to the performance gap(s)?
   - Organizational structure that does not support job level performance
   - Desired performance outcomes that are not aligned with business strategies
   - Desired performance outcomes that are not aligned with vision and values
9. Based on answers to questions 6, 7 and 8, what is causing or contributing to the performance gap(s)?

4 Identify requirements for closing gaps

10. Will the skill and knowledge provided through structured learning be sufficient to close the performance gap?
11. What solutions should we consider instead of, or in addition to, learning to address causes other than skill and knowledge?
12. What support do we need to implement both learning and other performance solutions?

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Designing curricula

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.

Here are some essential questions to consider when designing curricula:

1 Identify goals, principles and constraints

1. What are the business needs we are trying to solve for? How are they measured?
2. What are the goals of the curriculum?
3. What are the target learner profiles? How would you define their learner experience?
4. What is the learner journey before and after completing the curriculum?
5. What constraints do we need to consider?
6. What other organizational initiatives might impact the curriculum?

2 Create preliminary roadmap for curriculum

7. What are the desired performance outcomes? What other outcomes are expected?
8. How should we sequence and prioritize the outcomes?
9. What solutions should we consider instead of, or in addition to, learning to address gaps?
10. What is the ideal pathway? Is it the same for all groups of learners?
11. What platform or technology will be leveraged? How?
12. Does the roadmap address all contingencies? (such as learning for individual new hires, technical requirements of the learning management system, translation)

3 Design detailed roadmap for curriculum

13. What are the learning objectives for each curriculum component?
14. What is the best format and delivery channel for each curriculum component?

4 Prototype curriculum components

15. Do the templates and guidelines align with brand, voice, accessibility?
16. How will we ensure consistency across the entire curriculum?

5 Prepare to implement and sustain curriculum

17. What is the plan for implementation and maintenance of the curriculum?
18. How will we evaluate the components and the curriculum as a whole?

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Designing learning experiences

Competent design of structured learning 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, and structured learning materials support learning.

Here are some essential questions to ask when designing structured learning:

1 Conduct design analysis

1. What tasks/activities do we want learners to do – or do differently – after learning? *(desired performance outcome(s))*
2. How do the desired performance outcomes support the achievement of business/organization results?
3. Who are the learners? What is their education, job experience, level in the organization, attitude towards this learning?
4. What are the design or technology constraints? (such as location of learners, cost, design time, network limitations)
5. What guidelines or steps should learners follow when performing each task? *(task analysis)*
6. Who are the subject matter experts (SMEs) who can or should provide input on the task analysis?
7. Does the plan address all contingencies? (such as learning for individual new hires, technical requirements of the learning management system, translation)

2 Establish learning objectives and evaluation

8. Do the learning objectives support the desired performance outcomes?
9. What are the application-level learning objectives? (task/activities identified in question #1 above, conditions under which performed, plus standard for acceptable performance)
10. What are the comprehension-level learning objectives required to support the application-level learning objectives?
11. How will we evaluate achievement of each learning objective during training? (such as role play, case study, demonstration, multiple choice test)

3 Create detailed design

12. What is the best way to deliver the structured learning? (such as classroom, virtual classroom, e-learning, on-the-job)
13. What learning activities are required to achieve each learning objective? What is the timing for each? (detailed outline)
14. Have we optimized time for practicing each task? How will learners get meaningful coaching and feedback?
15. How will we support transfer of learning to the workplace? (such as opportunities to try new skills, feedback and coaching from the manager, recognition for a change in behaviour)
16. What steps do we need to take to get sign-off on the detailed outline before investing in development of materials?

4 Develop materials

17. What materials do learners need to support learning during the learning event?
18. What materials do facilitators need to support delivery of the training and evaluation of learning objectives?
19. How will we validate the learner and facilitator materials?

5 Support implementation

20. What are the implementation and maintenance requirements for the structured learning design and materials?
21. How will we prepare facilitators to deliver classroom, e-classroom learning?

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Facilitating learning

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.

Effective facilitation of structured learning results in a positive, comfortable, learner-centred environment, where learners share responsibility for the success of the learning event. An effective facilitator (trainer or instructor) maintains learner interest and supports learners in achieving the learning objectives.

The Competencies for Training and Development Professionals includes many competencies. Here is a checklist based on some of the essential ones.

1 Prepare to facilitate

- ☐ Review desired performance outcome, learning objectives and learner profile
- ☐ Arrange logistics and prepare contingency plans as required (such as internet access, materials, plans if equipment fails)
- ☐ Advise learners, supervisors and coaches of prerequisites and any pre-work requirements

2 Create learning environment

- ☐ Welcome learners as they enter the physical or virtual learning environment
- ☐ Use learners' names when responding to questions or comments

3 Engage learners

- ☐ Use a variety of instructional techniques to provide content (such as demonstration or group discussion)
- ☐ Maintain appropriate balance between providing content and allowing learners to practise
- ☐ Use appropriate language, anecdotes and examples to facilitate learning
- ☐ Pace training to meet the needs of the group
- ☐ Use bridges and transitions to orient learners and maintain continuity among concepts and sections
- ☐ Ask questions to facilitate discussions and check understanding
- ☐ Draw upon learner experience, knowledge and skill to enhance learning
- ☐ Encourage participation, questions and comments from learners
- ☐ Paraphrase learner questions and comments to ensure clarity and understanding before responding
- ☐ Adapt content or delivery in response to learner questions and comments

4 Foster learning

- ☐ Present information and concepts clearly, and demonstrate understanding of the organization and relevant job performance
- ☐ Ensure sufficient opportunities for learners to practice new skills
- ☐ Use relevant facts, examples or analogies to respond to questions or illustrate concepts
- ☐ Provide opportunities to use job aids and other relevant transfer materials to link forward to application

5 Assess learning

- ☐ Evaluate achievement of each learning objective before moving on to the next
- ☐ Provide feedback and coaching to reinforce learning
- ☐ Provide additional opportunities for learning and practice, as required

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Supporting transfer of learning

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

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.

It is important to consider how learning transfer will be supported at the needs assessment and design phases. Here are some essential questions to ask when planning to support transfer of learning:

Design and implement support for transfer of learning

1. What initiatives will we implement to support the transfer of learning? (such as on-the-job activities, coaching)
2. Who needs to be involved to ensure successful transfer of learning? (such as managers, team members, peers, coaches)
3. How can we leverage technology to support the transfer of learning? (such as automated reminders, performance tracking)
4. What materials should we develop to support the transfer of learning? (such as reference guides, coaching guides)
5. What can facilitators do during structured learning to support the transfer of learning? (such as providing relevant examples, having learners use reference material, providing time to complete action plans)

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Evaluating learning

Evaluating learning can take many forms, including surveys of learner reaction, knowledge tests, skill demonstrations, comparisons of pre- and post-training performance, and calculations of return-on-investment. The most commonly used framework, developed by Donald Kirkpatrick, outlines four levels of evaluation as shown below. Note that when assessing performance needs and designing training, you start at level 4 and work down. When evaluating, you start at level 1 and work up.

It is important to consider the plan for evaluating learning at the needs assessment and design phases. Here are the key questions to ask:

Plan for Evaluation	Conduct Evaluation
Level 4: Business/Organization Results	**Level 4: Business/Organization Results**
▪ What are the desired business/organization results? How are they measured? ▪ What desired performance outcomes support these results? ▪ What are the leading indicators of results? ▪ How will we track and measure results?	▪ What do the leading indicators suggest about results? ▪ What success stories can we quantify? ▪ What changes in business measures are due to learning? ▪ Do we need to change our training or non-training solutions?
Level 3: Performance in the workplace	**Level 3: Performance in the workplace**
▪ What are the desired performance outcomes? How will they be measured and reported? ▪ How does the work environment need to change to support performance? ▪ How will we support transfer of learning after the learning experience?	▪ What opportunities have learners had to apply their learning? ▪ To what extent are learners applying their learning? ▪ What barriers are hindering them? ▪ How does the learning need to change to impact performance in the workplace?
Level 2: Learning	**Level 2: Learning**
▪ What learning objectives support desired performance outcomes? ▪ How will we evaluate achievement of each learning objective? (performance tests for application-level objectives and cognitive tests for comprehension-level objectives)	▪ What was the prior level of skill/knowledge? ▪ What is the aggregate performance on each learning objective by the end of the learning experience? ▪ How does the experience need to change to impact learning?
Level 1: Reaction & Confidence	**Level 1: Reaction & Confidence**
▪ What meaningful information will we collect about learner reaction and confidence? (such as anticipated barriers to implementation) ▪ How will we get feedback from learners? ▪ How will we determine what needs to change?	▪ What skill/knowledge do learners say they gained? ▪ What's their level of confidence in applying their learning? ▪ What specific plans do they have to apply their learning? ▪ How does the structured learning need to change in response to feedback?

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