

**NEW ZEALAND ASSOCIATION OF
TRAINING & DEVELOPMENT**

COMPETENCY FRAMEWORK

BACKGROUND

Members of NZATD have identified professional development as a key benefit of their membership.

- Various issues have been raised in relation to professional development
- Significant variations in trainers' competencies
- No structured way to assess a trainer's competency
- No direction for new and upskilling trainers to focus their training
- Many ad hoc training/professional development courses offered but not tied into a structured framework.

PURPOSE

The Competency Framework has been developed to provide a framework that identifies the key skills and knowledge required for Learning and Development professionals, while recognising that Learning and Development Professionals may vary in their specialist areas.

The overarching goals are to raise standards within the L&D profession.

Key objectives guiding the development of the framework are:

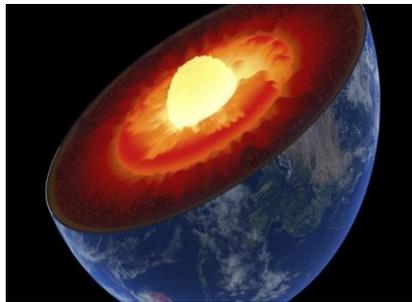
- To support the best outcome for NZ Inc. through identifying good practice in the delivery of L&D Services
- To identify the core skills that define all learning and development professionals
- To identify additional skills and knowledge that define each specialist area branch of the L&D profession
- To establish how L&D differs from other related disciplines
- To provide guidance to NZATD members on where to target their professional development
- To provide structured guidance to NZATD about the type of professional development the Association could/should be offering to /supporting its membership.
- To provide guidance to employers about the skills that define a competent L&D professional.

It is expected that the Competency Framework will be used to underpin a development programme and a professional accreditation process.

CORE COMPETENCIES

Adult Learning Principles (core)

- Discuss how adults learn
- Discuss the relative merits of a range of learning theories
- Describe how various theories can be applied in practice
- Explain what motivates adults to learn
- Describe how context impacts learning design
- Provide examples of how adult learning principles are applied in practice



Learning and Development Practice (Core)

- Describe the purpose of a needs assessment
- Describe the purpose of a learning needs analysis
- Write targeted learning objectives
- Describe how learning objectives relate to evaluation criteria
- Explain how learning objectives are supported by specific interventions
- Discuss a range of learning interventions that can be applied to meet the learning objectives
- Employ reflective practice techniques to support continuing professional development

SPECIALIST COMPETENCIES

Instructional Design

- Describe instructional design, its purpose and key elements
- Conduct a needs assessment
- Conduct a learning needs analysis
- Design learning activities consistent with adult learning principles
- Design learning activities which achieve learning objectives
- Design to meet accessibility standards
- Build assessment into the learning design
- Employ appropriate engagement techniques
- Use appropriate techniques to enable others to deliver on the learning design



Assessment

- Describe the purpose of assessment
- Differentiate between summative assessment and formative assessment
- Design assessments to ascertain whether learning objectives have been met
- Clarify evidence requirements for assessment
- Create a range of assessment techniques
- Evaluate assessment effectiveness and adjust , as required
- Formulate effective assessment questions
- Design and develop appropriate feedback for assessment outcomes
- Provide assessment data to identified target groups

On-the-Job Training

- Define On-the-Job training
- Describe when it is appropriate to use On-the-Job training
- Create training plans for On-the-Job training
- Conduct On-the-Job training
- Apply appropriate assessment methods to ascertain whether required performance criteria are met
- Use job aids to support the learner in the working environment, as required

Coaching

- Distinguish between Coaching and Mentoring
- Discuss the principles of coaching and compare different coaching models
- Create and implement a coaching plan
- Create a positive coaching environment
- Apply appropriate questioning techniques
- Apply reflective listening techniques
- Build rapport with the coachee
- Monitor coachee progress towards agreed goals

Evaluation

- Identify at least two evaluation models
- Define key strategies for Evaluation
- Identify different ways that Evaluation can be applied
- Plan evaluation strategies for each of the training objectives in a lesson plan
- Measure reaction to the training intervention
- Measure learning pre- and post- training
- Measure on the job application of learning
- Measure the intervention's impact on organisational outcomes
- Measure the financial impact of learning

eLearning

- Design eLearning experiences to engage learners
- Apply accessibility standards
- Design and apply on-line instructional design tools in appropriate ways to achieve learning outcomes
- Understand the principles of effective user experience (UX)
- Apply basic visual design principles that facilitate learning
- Incorporate appropriate feedback mechanisms to support the learning process
- Develop engaging assessments which match the learning outcomes

Facilitation

- Describe the difference between presentation and learning facilitation
- Maintain learner engagement throughout session
- Manage group discussions
- Manage learner behaviour
- Manage learning for different levels of knowledge, roles, backgrounds and personalities
- Plan, prepare and manage the learning environment and resources
- Adapt training in progress to meet learner needs
- Create opportunities for participation, reflection and social learning
- Ensure learners get feedback on their progress

Social Learning

- Identify what Social Learning is and its purpose
- Describe the characteristics that define effective social learning mechanisms
- Identify a range of Social Learning techniques in the workplace
- Design and implement social learning techniques within an organisational context
- Outline critical success factors when implementing Social Learning
- Engage and manage participation in Social Learning groups
- Evaluate and evolve Social Learning

LEARNING LEADER

Typical Roles Held: *L&D Manager, Training Manager, OD Manager, Senior L&D Specialist with direct reports, HR Manager*

Level in Organisation: *Head of L&D (part of, or separate from, HR) but not a direct report to CEO*

Develop and maintain strong working relationships with key business stakeholders

- Meets regularly with business managers to understand their business needs and the implications for learning and development
- Supports business managers in conducting a performance analysis before sending their staff to training, through advice and coaching
- Provides managers with the tools they need to analyse learning needs and support them to make wise learning decisions
- Manages expenditure and resources in line with approved delegations, guidelines, budget, deadlines and reporting requirements, with a focus on cost effectiveness

Develop and maintain effective L&D reporting systems

- Ensures the effective record keeping and reporting for all learning delivery is maintained and in line with policies and procedures
- Ensures there are systems in place to record and report all learning delivery activities
- Provides up-to-date reporting regarding training inputs, e.g delivery days, utilisation of delivery resources, cost, etc
- Reports on the effectiveness and efficiency of learning delivery

Plan and oversee the L&D project lifecycle

- Oversees the phases of a L&D project lifecycle
- Develop project plan that includes each of the phases
 - define project vision, objectives and deliverables
 - liaise with and engage stakeholders
 - develop plans and control measures to manage projects effectively
 - estimate task duration, sequence and schedule deliverables to track the progress of the project

- undertake risk analysis and manage the change control process
- determine evaluation processes to monitor the delivery of the projects delivery
- manage resources including people, costs and time.
- Overseas the L&D project utilizing the each of the phases in fundamental Project Management

LEARNING STRATEGIST

Typical Roles Held: *Chief Learning Officer, Head of Learning, GM HR, can also be other roles where there is significant interaction at CEO and Board level.*

Level in Organisation: *Direct report to CEO, Country Head or Consulting at this level*

Provides input into business strategy at Executive and Board level through a learning lens

- Develops enterprise wide business plans that address organisational learning challenges.
- Integrates/aligns learning and development strategies with other related disciplines such as organisational development, knowledge management and talent strategies
- Ensures that change programmes and strategic projects address learning needs
- Ensures that strategic workforce plans have addressed longer term L&D needs to support a sustainable business

Develop business cases for strategic L&D initiatives

- Analyses strategic business issues/challenges and opportunities and extrapolates the learning and development implications
- Develops RFP and other potential vendor documentation for major contracts (<100,000).
- Develops a range of alternatives to address the business need
- Develops a cost/benefit analysis for options
- Applies financial, business impact and other criteria to assess options.
- Develops a business case for CEO and/or Board level signoff

Champion L&D with strategic stakeholders

- Manages multiple stakeholder relationships for learning initiatives
- Uses influences to gain support at Executive and Board level for strategic learning initiatives
- Keeps the CEO, Executive / SLT / Board regularly informed about strategic L&D initiatives and challenges
- Encourages ownership from the CEO, Executive and Board for L&D Initiatives
- Showcases the financial and business impact of L&D as well as impact on individuals and staff engagement and employer of choice measures

Manage the delivery of learning at the enterprise level

- Ensures learning programmes being delivered are consistent with organisational culture.
- Monitors to ensure compliance training is current and fit for purpose and addresses issues as required
- Monitors to ensure the level and standard of operational and tactical training across the business is meeting business needs and addresses issues as required
- Monitors and ensures there is focus on learning transfer and that there are mechanisms in place to allow this to happen
- Articulate what it means to develop a coaching culture
- Identify strategies to develop a coaching culture

Manage Strategic Learning Initiatives to support organisational talent management

- Ensures that there are clear learning pathways to accompany the organisation's talent management and succession planning
- Works with the business and HR to identify development opportunities offered through project work, secondments, job swaps, and movement into "stretch" roles, etc.
- Provides learning support to individuals going through "stretch" development
- Manages the budget allocation for the Executive and those identified for high potential development