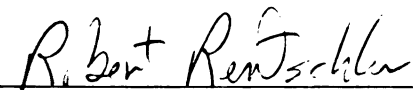This is to certify that the

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COMPETENCIES USED MOST FREQUENTLY
BY ADULT EDUCATORS AND THE JOB
ACTIVITIES CONSIDERED IMPORTANT
IN THEIR WORK

presented by

Peter K. Biwot

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of the requirements for

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COMPETENCIES USED MOST FREQUENTLY

BY ADULT EDUCATORS AND THE JOB ACTIVITIES

CONSIDERED IMPORTANT IN THEIR WORK

By

Peter K. Biwot

A DISSERTATION

Submitted to
Michigan State University
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DOCTOR OF PHILOSOPHY

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ABSTRACT

COMPETENCIES USED MOST FREQUENTLY

BY ADULT EDUCATORS AND THE JOB ACTIVITIES

CONSIDERED IMPORTANT IN THEIR WORK

By

Peter K. Biwot

The central purpose of the researcher in this study was to
identify a set of competencies which were used most frequently by
adult educators and job activities which were important in the work
of adult educators. The researcher examined the extent to which
each competency and job activity was used in performing the jobs.
The population consisted of 450 graduates in doctoral, Ed.S., and
masters degree programs in Adult and Continuing Education from
Michigan State University who completed an Adult Educator Question-
naire. The respondents numbered 139 and they were divided into two
major groups, ninety-one adult educators (67 percent) and forty-
five non-adult educators (33 percent), who held such professional
positions as administrators, supervisors, and program directors;
teacher, instructors, and trainers; and consultants and counselors.
Significant data for the study included responses to thirty-one
competencies and thirty job activities. The graduates rated
competencies to indicate the frequency of use, and to indicate the
importance of job activities to what they did in their work.

There was no significant difference in the rank means of
competencies and job activities as reported by the adult educators

who held different professional positions.   There were, however, some differences between the rank means of the adult educators and those of the non-adult educators.

Higher ranked competencies included Presentation Skills, Writing Skills, Feedback Skills, Intellectual Versatility, and Adult Learning Understanding.   Highly ranked job activities included Applying Theories of Adult Learning, Designing Programs, Administering Programs, Instructing and Conducting Programs Needs Assessment.

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This study is dedicated to my wife, Ruth, who fervently prayed for her husband and supported him in every way possible; to our son, Paul; and our daughters, Pauline and Patricia, who sacrificed their time and who were a source of encouragement and love. God bless you.

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CHAPTER I

INTRODUCTION

What should an adult educator know and be able to do to be considered professionally competent? These were searching questions in a study conducted by Chamberlain (Adult Education 11:78-82) in 1961 in which ninety leaders in the field of adult education described an administrator in adult education as one who believes in the potentiality of growth for most people, one who has a strong commitment to adult education, and one who practices this commitment by carrying on a continuing learning project for himself. These questions appear to be typical of current concern in the field of adult education.

The Rationale of the Study

From the rise of the industrial revolution, the educational systems have been forced to play an ever-increasing role in meeting human needs and demands. High illiteracy rates and unemployment due to lack of required knowledge and technical skills are only two of the many needs of the adult learners. Institutions such as families, schools, industry, business, labor organizations, churches, and the military are constantly challenged to meet these changing needs and demands. To meet these new challenges, scientific and technological human skills must be continually upgraded.

Adult and Continuing education is becoming a necessity for the adult members of our society as adult educators must now be involved in a variety of professional activities and possess many skills to effectively meet the ever-changing needs of adults. In our ever-changing world, training for the adult educator in the skills and knowledge that are needed must also change (Rossman and Bunning 1978:139).

Adult education as a field of study has emerged only in this century. The first journal to publish articles in the field of adult education was the Adult Education Journal, which was founded in 1926 and issued its first periodical in 1929. In 1930 the publication carried an article describing an early experiment that dealt with the preparation of adult education through a summer program. It also described the curriculum as consisting of topics such as problems of human adjustments, parental education, aesthetics in everyday life, economics as the determining factor in social institutions, and public opinion and adult education (Rossman and Bunning 19:67-74).

In 1948, Hallenbeck published one of the first comprehensive writings concerning the preparation of adult educators. He conducted an eclectic training program that not only required a knowledge of the specific subject matter to be presented, but also instructional methodology and materials, adult psychology, sociology of the adult, the history and philosophy of adult education, the function and administration of adult education, community

organization, programs and agencies, and the emotional requisites of adult educators (Hallenbeck 10:4-10).

Houle also listed a variety of learning experiences, methods, and techniques that would be of value to the adult educator and his development (Houle 12:140-141). In addition, Chamberlain conducted a rather intensive study of knowledge, skills, and attitudes that adult educators should have to be considered professionally competent (Houle 6:78-82).

Many experts in the field of adult education have identified various skills, knowledge, and attributes that are required for adult educators in order to enhance their effectiveness. A few studies have also been conducted to assess current needs or recommendations for adult education staff development including competency identification and development. The research in this survey was concerned with identifying those competencies and those activities performed by doctoral, Ed.S., and masters degree graduates of the Adult and Continuing Education (hereafter referred to as ACE) program at Michigan State University. Which competencies do these graduates use most frequently and which activities are they involved in their daily jobs?

This study was intended to provide valuable information to those who have the responsibility of preparing adult educators in the Department of Educational Administration at Michigan State University and to also guide and direct the academic planning of

the department so that the graduate program effectively meets the professional needs of those it seeks to train.

The study was also designed to provide information to adult educators of other institutions so that they may carry on the assessment of the effectiveness of their programs and their academic planning. The findings of this study may be of value to university administrators and those responsible for student services. Leaders in adult education and the alumni may have an interest in the findings of this study also.

The Importance of the Study

Every university involved in the training of adult educators must constantly seek to gain feedback from its graduates in order to modify its programs to meet their professional needs (Goyen, 1980:2). The present study is a part of a continuing effort to obtain information that would aid in improving the program in the Department of Educational Administration at Michigan State University. It is also recognized that those who have graduated with doctoral, Ed.S., and masters degrees in Adult and Continuing Education are in a most valuable position to provide the necessary data needed for the study.

Thomas Eaves maintains that trainers as educators of adults should logically have competencies that reflect preparation for professional practice (Eaves 1985:11). Where might such competencies be found? Eaves answers:

> Based upon the preponderance of elements/activities within the construct that are adult education related, it seems logical that the adult education curriculum is the starting point. Again, however, one needs to impose the "necessary and sufficient" rule. That is to say, adult development, adult learning/instruction, and programing are necessary and are common components of adult education curriculum (Eaves 1985:13-14).

In addition to Eaves' study, other adult educators have made similar observations. Among them are Rossman and Bunning (1978), Schultz (1976), Goyen (1980), and Chamberlain (1961). This study extracted the following observations from Rossman and Bunning that were considered very significant in the training and preparation of adult educators (Rossman and Bunning 1978:153):

1. Adult educators and those involved in the education of adult educators should be preparing for a rapidly changing future requiring specific competencies and specialties and a number of multi-faceted activities.

2. Criteria should be developed based on the responses obtained in this study so that the competencies that are rated the highest by adult educators can be identified.

3. Future adult educators could be seen as being involved in one of the two activities: (a) those who are professional educators who control, direct, evaluate, provide leadership, and enhance the adult education process; and (b) those who are facilitators of the process because of expertise in any given area of specialty. Self directed learning model must be seriously considered in the preparation of adult educators.

4. Learning activities designed to facilitate the acquisition of competencies identified in this study should be oriented toward practical on-the-job learning activities on the one hand, and should fully support the integrated programs that include university-based classes and seminars on the other.

Statement of the Problem

Too frequently, professional preparatory programs fail to examine the competencies and activities of practicing professionals. The central problem of this study, then, was to identify a set of common competencies which were used most frequently by the ACE graduates and the job activities which were important in the work of adult educators. Examining the competencies and job activities of professionals should provide a foundation for graduate program development which prepares them for their responsibilities by facilitating the development of the necessary competencies and the preparation for the activities performed in the job. There are no studies at the present time which have done so in the ACE graduate program at Michigan State University. Therefore, this study surveyed ACE doctoral, Ed.S., and masters degree graduates who are currently holding positions in various professions.

Research Questions

In order to identify the competencies which were used most frequently and activities of involvement which were important to adult educators, answers to the following questions were sought:

1. What are the current professional positions held by the adult educators who graduated from programs of studies in ACE at Michigan State University?

2. Is there a set of competencies which are common to adult educators regardless of the professional positions they hold?

3. Which competencies do ACE graduates use most frequently in performing their jobs?

4. Which job activities are considered to be important in the work of adult educators?

Procedures

The procedures followed in this study were as follows:

1. A list of competencies and job activities required for adult educators was extracted from a review of related research.

2. A questionnaire was constructed with Dr. Cas Heilman, a Professor in the Department of Educational Administration at Michigan State University. It contained a list of those competencies and activities extracted from the review of related research.

3. A pilot test of the questionnaire items was conducted with a group of adult educators to validate the instrument.

4. A questionnaire was mailed to doctoral, Ed.S., and masters graduates of the program of studies in ACE at Michigan State University to gather basic demographic information in order to determine the competencies used most frequently and activities they felt were important in their jobs.

5. Data from returned questionnaires were entered for statistical analysis using the SPSSX manual.

6. Data were analyzed utilizing frequency distribution, cross tabulations, and rank order.

Definition of Terms

In order that terms used frequently throughout this study may be understood, the following definitions are provided:

ACE Program: The program of studies of doctoral, Ed.S., and masters students in fulfilling degree requirements. This may include formal courses, internships, externships, and independent studies.

Adult Educator: An ACE graduate who is currently working with any agency which deals with the needs of adult learners.

Non-Adult Educator: Any ACE graduate who is not working with adult learners.

Competency: A set of skills and/or knowledge that is required of the adult educator to perform his professional role as an adult educator.

Job Activities: The ways in which the adult educators describe what they do in their jobs as professionals.

Important Activity: A specific assignment which is given to an adult educator to be carried on at any given time.

Position: The official title that briefly describes both the rank of the adult educator and what he does.

Type of Organization: That which describes the employer category of the respondent.

Total Work Experience: The length of time the respondent has been in any given job.

Limitations of the Study

This study may be limited by the following key factors:

1. Student Record: The personnel records from the university sources may not be complete, accurate, or up to date.

2. Reliability of Data: The data gathered may be affected by the limits of the survey instrument, the return rates, and the bias of the respondents.

3. The Findings: The findings are based on descriptive statistics of frequency distribution which means that theorizing and hypothesizing even the most basic apparent correlation are beyond the scope of the study.

4. **The Respondents**: The population surveyed in the study were the masters, doctoral, and Ed.S. graduates in the Department of Educational Administration at Michigan State University.

Summary of the Study

The steps followed in this study were as follows:

1. Chapter II includes the review of related literature in areas such as role perception, competencies, and preparation of adult educators.

2. Chapter III provides the description of the procedures followed in the study which includes the preparation of the instrument, the description of the population, and gathering and analysis of data.

3. Chapter IV deals with the description of data including reports on the current professional positions held by ACE graduates, the competencies used most frequently, and job activities which are important in the work of adult educators.

4. Chapter V contains the summary, conclusions, and recommendations for further research.

CHAPTER II

REVIEW OF RELATED LITERATURE

The review of literature related to the study undertaken centered around three broad areas: literature on role perception of adult educators, literature on adult educator competencies, and studies on the preparation of adult educators.

Role Perception

Role perception is perhaps one of the few areas which has received the greatest attention from very well known and outstanding adult educators who are involved in training and development. Larry G. Martin (1986) in his study on "Social and Economic Transformations: Contributions to the Professionalization of Adult Education" addresses three questions which should help adult educators focus on the challenge of social and economic change: What are the sources of social economic transformations? What are the role issues facing adult educators? What might be some suggestions for enhancing and expanding adult education programs so that they can increasingly contribute to shaping the future?

Earlier on, S.J. Rooth (1978), an Australian adult educator, in his study on "Prophet, Priest and King--The Role of the Adult Educator in the Context of Life Long Education", provided an overview of the Australian adult educator's roles, the primary one

being to foster the idea of lifelong learning for as many as possible. Rooth also discussed the concept of lifelong learning and the adult educator as an organizer of programs, teacher in many different environments, and social reformer.

Similar concerns on the role perception of adult educators were raised in several studies done in the 1970s. Burton W. Krietlow (1973), in work on the "Researcher's Role in Facilitating and Interface between Research and Practice in Adult and Continuing Education", argued rather convincingly that the researcher's role in moving research outcomes to practice is approached from a practical rather than a theoretical standpoint. Krietlow suggested that the roles the researchers have played are. (1) the researcher who conducts studies, writes official reports, and leaves the use of the findings to others; (2) the professional who reports his findings in journals and at professional conferences; and (3) the educator and change agent who considers teaching and public service, as well as research aspects of the profession. Krietlow held to the view that those accepting the third role accept the idea that interface between research and practice is the researcher's responsibility and the three essentials in bringing about an interface between research and practice are: (1) the research must be relevant to the practitioner; (2) the researcher must be involved in the practice of adult education; and (3) the researcher must communicate research plans, practice, and research results to the practitioner. This third objective can be achieved

by writing, film, TV videotape, radio, result demonstrations, models, reports at conferences and inservice programs, personal conferences, and teaching.

In addition to the studies conducted by individuals or groups of educators, there have also been studies carried out by national and internal adult educator agencies. These include the document which summarized the activities of the second international seminar on Adult Education (Blakely, 1971). Edmund des Brunner and others (1959) carried out similar studies in the 1950s and 1960s in which detailed reports of the role of the national organizations in Adult Education were compiled and submitted to the Executive Committee of the Adult Education Association.

Adult Educator Competencies

In order for any field to meet the training needs of its learners, it must take an inventory of the competencies needed by its learners. This competency identification is also applicable to the field of adult educator professionals who have done extensive studies on the competencies needed by the adult educators. Paul V. Delker (1982) in his study on "Adult Competency, the Key to Productivity" raised the question, "What is meant by adult competency?" To Delker, competency in the global sense is perhaps synonymous with such terms as human effectiveness. In the most restrictive sense, however, it includes only those skills and behaviors necessary to achieve a short-term result.

In his study Delker outlined his two basic principles: (1) competency-based education fosters in the learner the increasing capacity to learn, which is the increasing ability to respond to every human predicament--planned or unexpected, routine or crisis, initiated or imposed--as a learner; the ability to distill from every encounter a new competence, including the competence to learn and an increased capability to learn; and (2) competency based adult educators have a responsibility to understand and support human competence in its broadest sense.

In general, the majority of adult educators who have done extensive work on the competencies of adult education practitioners has concentrated its efforts in identifying the appropriate competencies of those in the field of adult education. The 1982 study by Daniel and Rose identified four functional areas of adult educators: (1) management and coordination, (2) human resource development delivery, (3) programming, and (4) career development.

Janice Schultz (1980), in her study on Communicative Competence and Life Long Learning, defined communicative competence as the ability of persons to be adaptive, flexible, and sensitive to the demands of other persons and of different situations at context. The principles of communicative competence include: (1) the ability to formulate and achieve objectives; (2) the ability to collaborate effectively with others, i.e. to be independent; and (3) the ability to adapt appropriately to situational and environmental variations. Schultz (1980) also cited Mary Jim

Josephs et al., who have identified competencies or skills of communication as including the following elements: values clarification, decision making, problem solving, group interaction, and critical thinking or analysis.

Bunning and Rossman (1978) utilized a four-stage Delphi approach to identify knowledge and skills that would be needed by adult educators in the next decade. The study was done in four stages in which the final stage clustered the statements into six categories: (1) the adult educator, (2) the field of adult education, (3) the adult learner, (4) the adult environment, (5) the adult education programming, and (6) the adult education process. The competencies which were identified in the study fall into four major clusters: (1) adult development, (2) adult learning/ instruction, (3) programming, and (4) management.

Perhaps the most comprehensive studies on competencies is the one which was carried out by the American Society for Training and Development (ASTD) in 1983. The report of the study as found in Models for Excellence defines the training and development field as (1) one of nine human resource specialty areas; (2) focussing on helping individuals change through learning; (3) consisting of fifteen key functions or roles; (4) producing 102 outputs for other training and development practitioners, learners, and organizations; and (5) requiring a body of knowledge which supports thirty-one competency (knowledge/skill) areas.

Preparation of Adult Educators

Having examined the adult educator competencies as identified in the existing studies, one should then pose the question "What is the implication of such identified competencies?" Daniel and Rose (1982) suggest that training and development curricula should include training in research and statistics, media development and production, and counseling and career development. Ideally, then, a graduate program to prepare trainers should incorporate into adult education business management and counseling.

Included in the studies done on the training of adult educators was the two step actions in competency adult education by P.V. Delker (1982). The two step actions are: (1) that adult educators should systematically research, develop, and implement competency-based developmental education for adult; and (2) that adult educators should take leadership in a philosophical quest of human and adult competency.

A.W. Bunichter and D.L. Gardner (1978) did a study similar to Delker's. The study was simply a guide for designing programs to develop adult educator competencies as determined by other adult educators in the state of Florida. The listing competencies included statements that describe the essential knowledge and skills desired for effective teaching of adults.

C.C. Veri (1968) did a rather in-depth study on the design of a doctoral degree program in adult education based on expressed needs of professional practitioners. Veri had the purpose of

designing a program of studies leading to the doctorate degree in adult education based on the experience which doctoral degree holders believed they needed in order to carry out their day-to-day roles of professional adult educators. Various theoretical models of study in Veri's study included his own in which he saw an interface between administration and teaching, and teaching and receiving. The other models in the study included (1) Essert's model of Core study, which consists of courses in foundations and principles of adult education; structural organization of adult education in relation to social institutions and cultural change; adult psychology and adult learning; program design and education process for adults; and integrative seminars in adult education; (2) Augmentation Courses, which are to add breadth and depth to the core program with courses in sociology, anthropology, economics, philosophy, and aesthetics; and (3) Specialization Courses, which are selected by the student on the basis of his specific experiences and vocational goals.

The Knowles Model of Doctorate in Education was also examined by Veri. The model, also known as construct, has been called the "role theory" of doctorate in education. Veri observed Knowles as perceiving the doctoral degree holders as fulfilling certain generalized and specialized roles such that all educators passed common competencies as generalists, and differentiated competencies as specialists. Veri went on to state that "in this sense, a person is first an educator, and then teacher, and administrator,

counselor and so on" (Veri, 1968:30). According to Veri, Knowles

suggested that a graduate curriculum must be defined on the basis

of answers to the following questions:

1. What are the functions required in the roles of an educa-

    tional specialist?

2. What are the functions required in the roles of each kind

    of educational specialist?

3. What are the competencies required to perform each of the

    above functions?

4. What are the cognitive, affective, and psychomotor

    learnings that make up each competency?

5. What are the objectives in terms of behavioral changes

    which will effect these learnings?

6. What program of learning activities will achieve these

    objectives according to a design that provides for con-

    tinuity, sequence, and integration of learning?

Veri concluded his observation of Knowles' role theory model

by stating,

> In essence Knowles is saying: curriculum would be
> competency centered instead of subject centered. Units
> of learning would be specified in terms of competencies
> to be developed. Study is to be directed toward the
> stimulation of mutual inquiry by the students and
> teachers together. Further, the relevant role of the
> student would be one of responsible inquirer rather
> than dependent receptor (Veri 1968:30).

Veri also examined several other studies which have been done

on the preparation of adult educators. The White study (Veri 1968)

was done in 1950 in order to explore the similarities of training

interests in course topics for inservice training of adult educators who had the responsibility for the management of adult education programs. Veri examined the details of the procedure used by White in his study in which a core of nine topics was found where there was a high level of common interest. The core included the following topics: (1) to gain a better understanding of the basic needs which cause adults to participate in any educational program; (2) to gain learner insight into the changing interests of adults in vocation, religion, family, leisure time activities, health, and areas of life; (3) to increase ability to apply psychological principles to selection of objectives; (4) to acquire techniques for relating the programs more closely to the general needs of the community; (5) to acquire techniques for relating the programs more closely to the needs and interests of adults; (6) to become more skillful in recognizing the community needs and resources that are important to adult education programs; (7) to develop a better understanding of the kinds of educational methods most suitable for mature people; (8) to develop a better understanding of the kinds of materials most suitable for mature people; and (9) to become more familiar with procedures for "keeping up" with new development and materials for adult education.

The final study cited by Veri is the Aker study (Veri 1968). The purpose of Aker's study, which was done in 1962, was to identify and organize criteria that would be useful in evaluating and determining the effectiveness of graduate programs in adult

education. His findings revealed that twenty-three behaviors were judged to be adequate criteria for determining the achievement of educational objectives.

Perhaps the most recent study on the preparation of adult educators was the one done by Thomas A. Eaves on Trainer Competencies: An Examination of Existing Research (1985). Eaves cites several studies which have been done in the last four decades. The first were Hallenbeck's comprehensive studies done in 1948 to identify the adult educator's role. The elements included in those studies were: (1) instructional methodology and materials on adult psychology; (2) sociology of adulthood-history and philosophy of adult education; (3) administration of community organization, (4) programming functions; and (5) knowledge in particular subjects such as English and Math.

Some eight years later Houle (1956) suggested that the professors of adult education should help their students achieve (1) a sound philosophical conception of adult education; (2) knowledge of basic sociological and psychological concepts germane to adult education; (3) knowledge of various agencies in which adult education is practiced; (4) the ability to plan, develop, implement, and evaluate educational activities; (5) the ability to train leaders; (6) the ability to counsel and guide learners; (7) the ability to develop and promote programs; (8) the ability to coordinate and supervise programs and personnel; (9) the ability to evaluate; and (10) personal effectiveness and group leadership.

Naddler and Lippitt (1967) clustered role elements of the training director into three such roles: learning specialist, administrator, and contributor to organizational problem solving. In 1968 Gossage determined that training directors needed two major categories of competencies: college-based and job-based. College-based competencies included: (1) the ability to develop and supervise programs; (2) knowledge of educational principles; (3) the ability to communicate; (4) knowledge of business principles; and (5) the ability to conduct classes. Gossage suggested that to gain these competencies, one should have course work in human behavior instructional methodology, administration, communication, business, and research methods. Competencies which, according to Gossage, are best developed on the job included: (1) policy implementation; (2) developing and supervising programs; (3) determining training needs; (4) conducting training; and (5) maintaining human relations (Eaves, 1985:3).

Eaves also cites two works on the same topics which were done in 1978 by Bunning and Rossman, and in 1982. A study performed by Daniel and Rose supplemented the data base provided by Bunning and Rossman by providing practitioner (continuing education administration) perspective. According to Eaves, this body of research revealed that trainers perform activities in four functional areas: management and coordination, programming, human resource development delivery, and career development training and development. Curricula should therefore include training in research/statistics,

media, development/production, and counseling/career development. Eaves strongly suggested that a graduate program to prepare trainers should incorporate adult education, business/management, and counseling.

CHAPTER III

RESEARCH PROCEDURES AND METHODOLOGY

The sections presented in this chapter include the following: Preparation of the Instrument, Variables of Interest, The Sample, The Collection of Data, and Analysis Techniques.

Preparation of the Instrument

The development of the instrument used in this study was done jointly between the researcher and Dr. Cas Heilman, a professor in the Department of Educational Administration at Michigan State University. Dr. Heilman contributed significantly in the formulation of the job activities, sections on university programs, and the items on the personal data of the respondents. The development of the instrument was also the result of a review of literature related to the competencies and job activities of adult educators. Several studies have been accomplished on the identification of competencies desirable for adult educators, and the preparation of those who are practitioners in the field of adult education. The primary focus in this section, however, was on those studies that dealt with various instruments, methods, and procedures of collecting, analyzing, and interpreting the data in the competencies of adult educators. The studies by Rooze (1984) and Charters (1978) both examined the skills required of human resource development

(HRD) specialist or adult education program administrators and the competencies which were identified as being important to their job performance.

The other study on the development of the survey instrument was done by Chamberlain (1961). Several steps were taken in the study to determine what competencies should constitute an inclusive list: (1) the wording of statements describing each competency in a way that provided the same meaning to each person reading the statement; (2) selecting a statistical technique that would provide definitive information about the elements which make up successful adult education practice; and (3) adequately covering the range of social situations in which the adult educator functions. Much later, a study by Rossman and Bunning (1978) used a Delphi technique. This method was designed to provide for an impersonal, anonymous setting in which opinions could be voiced without bringing the experts together in any kind of face-to-face confrontation. The technique was basically a method of collecting and organizing data comprised of expert opinion. An effort to produce a convergence of group consensus was accomplished through a series of three or four questionnaires dealing with future oriented questions. A setting was provided in which ideas could be modified on the basis of each expert's independent opinion rather than the influence of the majority opinion. Contact was usually made with the respondents through a set of mailed questionnaires with

feedback from each round of questions being used to produce more carefully considered opinions in succeeding rounds.

The survey instrument used in this study is based on the modified Models for Excellence developed by the American Society for Training and Development (ASTD) in 1983. The methodology employed in the research consisted of a series of studies that were designed to accomplish the following steps:

1. Determining the domain of the training and development field. This was achieved by a preliminary list of ten human resource sub-functions drawn from McLogan's 1981 training strategy.

2. Determining the key roles for the training and development field in which a study team drew a list of roles from the previous studies and hypothesized additional roles based on several assumptions about the field.

3. Identifying the major environmental forces expected to affect the field in the near future. In late 1981, the study team drew a list of future forces that could affect the training and development field from literature published in 1980.

4. Identifying the critical outputs that the training and development were expected to produce. The study team first reviewed past studies for training and development tasks and activities. These data were translated into output language. A role was assigned an output of more

than fifty percent (50%) of the respondents assigned as a direct responsibility of that role.

5. Identifying the critical competencies for the training and development field. The study team reviewed past studies and the project assumptions listed the knowledges and skills presented in the studies and inferred by the project assumptions and rationally clustered the knowledge and skills into competency areas. This step produced a list of thirty-one competencies and their definitions, a list of critical competencies for each of the fifteen roles, and a roles/competencies matrix showing the relationship of all roles to all competencies.

6. Developing behavioral anchors for competencies. The study team applied an adaptation of Smitts and Kendall's (1963) approach to developing and validating behavioral anchors. The major difference was that the ASTD study describes competencies, not behavioral dimensions. This step produced the final draft competency model for the training development field.

7. Clustering the roles to reflect common competency requirements. In this step, the team clustered the roles to reflect their common requirement. Role correlations were computed based on the future criticality of competencies to the roles. This final step of the ASTD study

produced four role cluster profiles: interface cluster competencies, concept development competencies, research cluster competencies, and leadership cluster competencies.

The survey instrument used in this study has three major sections:

Section 1: Training and development in which thirty-one (31) knowledge and skill areas which the American Society for Training and Development (hereafter referred to as ASTD) competency study has identified as important for excellent performance in training and development field (ASTD competency study 1983:36). The original format and content of the thirty-one competencies was retained in its entirety.

Section II: The Adult and Continuing Education Program with thirty activities of involvement was adapted from ASTD key development and training roles (1983:29). Some items were deleted, others were modified, and others were added as was considered necessary in order to assure the applicability of the instrument.

Section III: Personal data consisted of basic demographic characteristics such as educational background, gender, age, nationality, status during the ACE program, job category, employer category, professional positions held, and work experience.

The second step was to present the questionnaire to a team of experts for the purpose of evaluating the format, clarity, and content. The team consisted of doctoral graduates representing

various professional positions and fields such as a coordinator of student affairs, a director of a center for the aging, a vice-president for college and community relations, and a director of human resources and strategic planning. All of the experts were asked to go through the instrument as thoroughly as possible and to make any deletions of items they felt were unimportant, recommend any items they felt were important but were not in the instrument, and review the general format of the instrument. With the exception of Section I (training and development) of the instrument, all the recommendations and corrections made were considered and incorporated before a final format and content were decided (Appendix 2).

The Dependent Variables

The respondents, who had doctoral, Ed.S., and masters degrees in Adult and Continuing Education at Michigan State University, were asked to indicate the extent to which they used each competency in performing the job. They were also asked to indicate that which best reflected their opinion of the importance of the job activity in performing as a professional adult educator. Each of the competencies and job activities was assigned a four-point Likert-type scale, with 1 = little or no extent, 2 = some extent, 3 = considerable extent, and 4 = great extent to indicate how frequently the competencies were used, and the importance of each job activity in performing the jobs. The dependent variables in the study were:

1. A score assigned by the respondents to indicate how frequently they used the competency.

2. A score assigned by the respondents to indicate how important each job activity was in performing the jobs.

Each of the thirty-one competencies and thirty job activities were scored independently on the two scales.

The Population

The population consisted of 450 graduates in M.A., Ed.S., and Ph.D. degrees from the programs in ACE at Michigan State University (1960-1987). The respondents of the study consisted of 139 (30.8 percent) graduates who completed and returned their questionnaires.

Gender

Sixty-eight (49.6 percent) of the alumni were males and sixty-nine (50.3 percent) were females.

Age

Two (1.4 percent) of the respondents were below 30 years, thirty-six (26.1 percent) were between 30 and 40, forty-six (33.3 percent) were between 41 and 50, and fifty-three (39.1 percent) were more than 51. The age category below 30 is the least represented and the category of more than 51 is the most represented.

Degree in ACE

Eighty-six (61.8 percent) of the respondents were M.A. graduates, twelve (8.6 percent) were Ed.S. graduates, and forty-one (29.4 percent) were Ph.D. graduates.

Year of ACE Program Completion

Eleven (7.9 percent) of the M.A. graduates completed the program between 1963 and 1970, thirty-four (24.4 percent) completed their M.A. between 1971 and 1980, and thirty-eight (27.3 percent) completed their M.A. between 1981 and 1987. Only eight (5.7 percent) completed their Ed.S. between 1965 and 1975, and four (2.8 percent) completed their Ed.S. between 1976 and 1987. Ten (7.1 percent) completed their Ph.D. between 1959 and 1969, fourteen (10 percent) completed their Ph.D. between 1970 and 1979, and sixteen (11.5 percent) completed their Ph.D. program between 1980 and 1987.

Employer Category

The results of categorizing the respondents by type of organization are shown in Appendix 4. Government-sponsored agencies were the primary employers of the respondents as they employ ninety-eight (72.5 percent) with the breakdown as follows: twenty-seven (20 percent) were in the public school system; nineteen (14.1 percent) in community or junior colleges, thirty-one (23 percent) in a four-year college/university; four (3 percent) in

county/city agencies; eleven (8.1 percent) in state agencies; and six (4.4 percent) in other government or combined agencies.

Non-government sponsored agencies employ forty-one (27.5 percent) of the respondents. Fourteen (10.3 percent) were in business and industrial firms; four (3 percent) in independent colleges or universities; three in religious organizations; and six (4 percent) in other non-government agencies. There were five (3 percent) respondents who were self-employed and four (3 percent) who were either unemployed or retired.

Collection of Data

An adult educator questionnaire was mailed to the respondents comprised of graduates of masters, Ed.S., and doctoral degrees in the Department of Educational Administration. A total of 606 questionnaires were mailed to ACE graduates with eighty-eight (19.5 percent) returned due to wrong addresses. Completed questionnaires were received from 139 alumni (30.8 percent) out of 450 questionnaires. Time for completion of the questionnaire ranged from 18 to 25 minutes. Data were collected during a four-week time period.

At the end of four weeks the data from the pre-coded sections of the survey instrument were entered into the computer. The uncoded section (open-ended questions) was coded and entered into the computer for analysis (see Appendix 2).

Analysis Techniques

The analysis was done based on the data obtained from the research questions.

Research Question 1: What are the current professional positions held by adult educators who graduated from programs of studies in ACE at Michigan State University? Frequencies and percentages were used to identify the current professional assignments.

Research Question 2: Are there are a set of competencies which are common to adult educators regardless of the professional positions they hold? The mean rating of competencies was tabulated and ranked. Based on these rank means, all the competencies with

= 3.00 and above were considered common to adult educators.

Research Question 3: Which competencies do the graduates use most frequently in performing their jobs? The mean rating for each competency by the respondents was tabulated. According to these means, competencies were ranked with the highest mean being used the most and the lowest mean being used the least.

Research Question 4: Which job activities do the respondents consider to be important to the work of adult educators? The mean rating of each activity was tabulated, and according to these means, the job activities were ranked with the highest mean being the most important job activity, and the lowest mean being the least important job activity.

CHAPTER IV

THE FINDINGS

The primary objective of the study was to determine if a common group of professional competencies could be identified for adult educators regardless of their positions. Secondary objectives included:

1. Determining the professional competencies used most frequently by adult educators;

2. Determining a common set of job activities which are considered important in the jobs of adult educators.

Archival data were gathered; a survey instrument was developed jointly by the researcher and Dr. Heilman, a Professor in the Department of Educational Administration at Michigan State University, tested, and mailed to all the graduates of the Program of Studies in Adult and Continuing Education, College of Education, Michigan State University. Responses were received from 139 alumni and data were entered, analyzed, and yielded the following results:

Current Professional Positions

Research Question 1: What are the current professional positions held by adult educators who graduated from programs of studies in ACE at Michigan State University? The ACE graduates' current professional positions were categorized using job category

which was adapted from the Dictionary of Occupational Titles of the U.S. Department of Labor, and the results are shown in Table 1. Ninety-one (67 percent) of the respondents were in adult education with a breakdown of forty-nine (37.0 percent as administrators, twenty-four (17.8 percent) as teachers, instructors, and trainers; and seventeen (12.6 percent) as consultants, counselors, program writers, etc.

Thirty-three (33 percent) of the respondents were in non-adult educators with a breakdown as follows: twenty (24.4 percent) were administrators, supervisors, and program directors; four (2.9 percent) were teachers, instructors, or trainers; and nine (6.6 percent) were consultants, counselors, etc. Seven (5.1 percent) of the respondents were categorized as others because it could not be determined which of the above two categories applied to them. Four (2.9 percent) of the respondents were either retired or unemployed. It was observed that a large proportion (67.0 percent) of ACE graduates held positions in the adult education field. It was also observed that in both categories (adult education and non-adult education) more respondents held administrative positions than those in teaching or consulting positions (Table 1).

The Rank Order of Competencies as Reported by ACE Graduates

Research Question 2: Are there a set of competencies which are common to Adult Educators regardless of the professional positions they hold? The respondents were asked to indicate the

Table 1

Professional Positions of ACE Graduates
(N = 135)*

Professional Position	Frequency	Percent
Adult Educators	91	67.4
Administrators, Supervisors, Program Directors	50	37.0
Teachers, Instructors, Trainers	24	17.8
Consultants, Counselors, etc.	17	12.6
Non-Adult Educators	33	24.4
Administrators, Supervisors, Program Directors	20	24.4
Teachers, Instructors, Trainers	4	14.8
Consultants, Counselors, etc.	9	6.6
Others	7	5.1
Unemployed/Retired	4	2.9
	135	100.0

*Four (2.9 percent) did not respond.

extent to which they used each competency in performing their jobs. The frequencies of all the responses were tabulated and ranked according to their means. Of the thirty-one competencies rated on a four-point Likert scale: 1 = little to no extent, 2 = some extent, 3 = considerable extent, and 4 = great extent, only those with the rank mean of 3.00 and above, which corresponded to "considerable extent" on the four-point Likert scale, were considered common to adult educators who graduated from programs in ACE at Michigan State University. There were nineteen competencies which were observed to be common to the respondents who held positions in the field of adult education (Table 2).

Research Question 3: Which competencies did the ACE alumni use the most in performing their jobs? The mean ranking of each competency was tabulated, with the highest mean being the competency used most frequently and the lowest mean being the competency used the least in the current professional positions held by the ACE graduates. Of the thirty-one competencies rated on a four-point Likert-type scale: 1 = little to no extent, 2 = some extent, 3 = considerable extent, and 4 = great extent, only those with a mean of 3.0 and above were considered used most frequently. The ACE graduates who returned the questionnaires were arranged into two groups: group one consisted of those who were adult educators (N = 91) and group two consisted of those who were non-adult educators (N = 45). The graduates in both groups held the following professional positions: administrators, supervisors, and

Table 2

Mean Rank Order of Competencies as Reported
by ACE Graduates (N = 139)

Competency	Rank Order	$\bar{x}$	S.D.
Presentation Skills	1	3.671	.558
Writing Skills	2	3.529	.690
Feedback Skill	3	3.518	.631
Intellectual Versatility	4	3.503	.645
Adult Learning Understanding	5	3.474	.738
Relationship Versatility	6	3.439	.783
Group Process Skills	7	3.426	.840
Organization Understanding	8	3.369	.749
Delegation Skill	9	3.340	.883
Counseling Skill	10	3.333	.748
Objective Preparation Skill	11	3.283	.771
Questioning Skill	12	3.234	.889
Organization Behavior Understanding	13	3.218	.873
Facilities Skill	14	3.175	.922
Negotiation Skill	15	3.149	.937
Futuring Skill	16	3.088	.876
Training and Development Techniques Understanding	17	3.038	.871
Competency Identification Skills	18	3.029	.765

Table 2 (cont'd.)

Competency	Rank Order	$\bar{x}$	S.D.
Records Management Skill	19	3.015	.964
Data Reduction Skill	20	2.963	.953
Library Skills	21	2.919	.911
Personnel/Human Resource Field Understanding	22	2.916	1.052
Performance Observation Skills	23	2.832	.860
Career Development Knowledge	24	2.742	1.003
Training and Development Field Understanding	25	2.725	. 1.038
Cost-Benefit Analysis Skill	26	2.715	1.056
Model Building Skills	27	2.701	.996
Knowing the Key Concepts and Variables that Define an Industry or Sector	28	2.664	1.025
Computer Competence	29	2.639	1.133
Audio/Visual Skill	30	2.627	1.043
Research Skills	31	2.462	1.016

program directors; teachers, instructors, and trainers; and consultants and counselors.

Seventeen competencies had the mean of 3.0 and above for the adult educators. There were, therefore, seventeen competencies which were used most frequently by adult educators (Table 3A).

The non-adult educators indicated that they used fifteen competencies most frequently (Table 3B). These competencies were all included in the seventeen competencies which were used most frequently by the adult educators.

The graduates were also categorized according to years of experience. There were two categories: those whose work experience was less than ten years, and those who had work experience of more than ten years. The graduates were in two groups: adult educators and non-adult educators. The mean rank order of competencies based upon frequency of use by years of experience was obtained from both groups.

The adult educators indicated they used nineteen competencies most frequently (the mean of 3.0 and above which corresponded to 3 = considerable extent on the four-point Likert scale; please see Table 4A). The non-adult educators indicated they used twenty competencies most frequently. All the competencies indicated by non-adult educators being used most frquently were similar to those indicated by the adult educators with the exception of Data Reduction Skill, which ranked 14th with a mean of 3.087 (see Table 4B)

Table 3A

Mean Rank Order of Competencies Based on Frequency of Use
by Professional Positions (Adult Educators N = 91)

Competency	Administrators Supervisors Program Directors $\bar{X}$	Teachers Instructors Trainers $\bar{X}$	Consultants Counselors $\bar{X}$	Cumulative Rank Means $\bar{X}$	Rank
1. Adult learning understanding	3.520	3.521	3.823	3.577	2
2. Audio/visual skill	2.510	2.541	2.764	2.566	27
3. Career development knowledge	2.979	2.608	2.705	2.831	22
4. Competency Identification skills	3.041	3.000	3.000	3.022	17
5. Computer competence	2.836	2.375	2.764	2.700	25
6. Cost-benefit analysis skill	3.020	2.166	2.529	2.700	25
7. Counseling skill	3.320	3.544	3.294	3.373	10
8. Data reduction skill	2.940	2.772	2.941	2.898	20
9. Delegation skill	3.680	2.958	3.294	3.417	8
10. Facilities skill	3.360	2.869	3.411	3.244	14

Table 3A (cont'd.)

Competency	Administrators Supervisors Program Directors $\bar{X}$	Teachers Instructors Trainers $\bar{X}$	Consultants Counselors $\bar{X}$	Cumulative Rank Means $\bar{X}$	Rank
11. Feedback skill	3.540	3.391	3.588	3.511	6
12. Futuring skill	3.312	2.739	3.294	3.159	16
13. Group process skills	3.612	3.347	3.470	3.516	5
14. Knowing the key concepts and variables that define an industry or sector	2.687	2.363	2.529	2.574	26
15. Intellectual versatility	3.612	3.363	3.470	3.522	4
16. Library skills	2.816	3.130	3.000	2.932	18
17. Model building skills	2.938	2.666	2.647	2.816	23
18. Negotiation skill	3.500	2.772	2.882	3.195	15
19. Objective preparation skill	3.354	3.272	3.411	3.344	11
20. Organization understanding	3.632	3.181	2.941	3.386	9
21. Organization behavior understanding	3.428	3.285	3.058	3.321	12

Table 3A (cont'd.)

Competency	Administrators Supervisors Program Directors $\bar{X}$	Teachers Instructors Trainers $\bar{X}$	Consultants Counselors $\bar{X}$	Cumulative Rank Means $\bar{X}$	Rank
22. Performance observation skills	3.062	2.761	2.470	2.872	21
23. Personnel/human resource field understanding	3.270	2.571	2.294	2.906	19
24. Presentation skills	3.673	3.772	3.647	3.693	1
25. Questioning skill	3.387	3.142	3.176	3.287	13
26. Records management skill	3.020	2.772	3.352	3.022	17
27. Relationship versatility	3.425	3.681	3.411	3.488	7
28. Research skills	2.469	2.500	2.705	2.522	29
29. Training and development field understanding	2.854	2.809	2.705	2.813	24
30. Training and development techniques understanding	3.020	3.142	3.058	2.159	16
31. Writing skills	3.591	3.318	3.705	3.545	3

Table 3B

Mean Rank Order of Competencies Based on Frequency of Use
by Professional Positions (Non-Adult Educators N = 33)

Competency	Administrators Supervisors Program Directors $\bar{X}$	Teachers Instructors Trainers $\bar{X}$	Consultants Counselors $\bar{X}$	Cumulative Rank Means $\bar{X}$	Rank
1. Adult learning understanding	3.368	3.500	2.888	3.252	9
2. Audio/visual skill	2.473	3.500	2.888	2.953	16
3. Career development knowledge	2.421	2.500	2.111	2.344	27
4. Competency Identification skills	3.157	2.750	2.666	2.857	19
5. Computer competence	1.200	1.750	2.777	1.909	31
6. Cost-benefit analysis skill	2.947	2.000	2.777	2.574	26
7. Counseling skill	3.315	4.000	2.666	3.327	6
8. Data reduction skill	3.210	2.000	3.333	2.847	20
9. Delegation skill	3.421	3.000	2.666	3.029	15
10. Facilities skill	3.210	2.500	3.000	2.903	17

Table 3B (cont'd.)

Competency	Administrators Supervisors Program Directors $\bar{x}$	Teachers Instructors Trainers $\bar{x}$	Consultants Counselors $\bar{x}$	Cumulative Rank Means $\bar{x}$	Rank
11. Feedback skill	3.894	3.500	3.555	3.649	3
12. Futuring skill	3.473	2.000	2.666	2.713	22
13. Group process skills	3.315	3.500	3.111	3.308	7
14. Knowing the key concepts and variables that define an industry or sector	3.052	2.000	2.777	2.609	25
15. Intellectual versatility	3.684	4.000	3.333	3.672	2
16. Library skills	2.842	3.000	2.777	2.873	18
17. Model building skills	2.526	2.250	2.111	2.295	29
18. Negotiation skill	3.421	1.750	2.888	2.686	23
19. Objective preparation skill	3.100	3.250	3.111	3.153	13
20. Organization understanding	3.578	3.250	3.222	3.350	5
21. Organization behavior understanding	3.578	2.666	3.222	3.155	12

Table 3B (cont'd.)

Competency	Administrators Supervisors Program Directors $\bar{X}$	Teachers Instructors Trainers $\bar{X}$	Consultants Counselors $\bar{X}$	Cumulative Rank Means $\bar{X}$	Rank
22. Performance observation skills	2.947	3.000	2.555	3.167	11
23. Personnel/human resource field understanding	3.222	1.666	3.000	2.629	24
24. Presentation skills	3.736	4.000	3.555	3.763	1
25. Questioning skill	3.421	3.000	3.333	3.251	10
26. Records management skill	3.277	1.666	3.222	2.721	21
27. Relationship versatility	3.473	3.000	3.333	3.268	8
28. Research skills	2.421	2.000	2.222	2.214	30
29. Training and development field understanding	2.555	2.333	2.666	2.518	27
30. Training and development techniques understanding	3.111	3.333	2.777	3.073	14
31. Writing skills	3.789	3.666	3.444	3.626	4

Table 4A

Mean Rank Order of Competencies Based
on Frequency of Use by Years of Experience
(Adult Educators N = 91)

Competency	Years of Experience		Cumulative Rank Means	
	$\leq$ 10	> 10		
	$\overline{X}$	$\overline{X}$	$\overline{X}$	Rank
1. Adult learning understanding	3.500	3.634	3.567	2
2. Audio/visual skill	2.538	2.588	2.563	28
3. Career development knowledge	2.810	2.846	2.828	24
4. Competency identification skills	3.000	3.039	3.019	18
5. Computer competence	2.641	2.745	2.693	27
6. Cost-benefit analysis skill	2.657	2.730	2.693	27
7. Counseling skill	3.410	3.346	3.378	10
8. Data reduction skill	2.864	2.923	2.893	22
9. Delegation skill	3.153	3.615	3.384	8
10. Facilities skill	3.223	3.250	3.236	14
11. Feedback skill	3.526	3.500	3.513	6
12. Futuring skill	3.135	3.176	3.155	16
13. Group process skills	3.394	3.607	3.500	5
14. Knowing the key concepts and variables that define an industry or sector	2.351	2.740	2.545	29
15. Intellectual versatility	3.473	3.560	3.516	4
16. Library skills	2.973	2.901	2.937	20
17. Model building skills	2.736	2.877	2.806	26

Table 4A (cont'd.)

Competency	Years of Experience		Cumulative Rank Means	
	≤ 10 X̄	> 10 X̄	X̄	Rank
18. Negotiation skill	3.108	3.260	3.184	15
19. Objective preparation skill	3.324	3.360	3.342	11
20. Organization understanding	3.157	3.560	3.358	9
21. Organization behavior understanding	3.263	3.367	3.315	12
22. Performance observation skills	2.837	2.890	2.863	23
23. Personnel/human resource field understanding	2.894	2.916	2.905	21
24. Presentation skills	3.684	3.700	3.692	1
25. Questioning skill	3.263	3.306	3.284	13
26. Records management skill	3.263	2.840	3.022	19
27. Relationship versatility	3.666	3.360	3.513	7
28. Research skills	2.605	2.460	2.532	29
29. Training and development field understanding	2.815	2.812	2.813	25
30. Training and development techniques understanding	2.921	3.166	3.043	17
31. Writing skills	3.526	3.560	3.545	3

Table 4B

Mean Rank Order of Competencies Based
on Frequency of Use by Years of Experience
(Non-Adult Educators N = 45)

| Competency | Years of Experience | | Cumulative Rank Means | |
	≤ 10 $\bar{X}$	> 10 $\bar{X}$	$\bar{X}$	Rank
1. Adult learning understanding	3.200	3.291	3.252	8
2. Audio/visual skill	2.550	2.958	2.754	25
3. Career development knowledge	2.550	2.583	2.566	28
4. Competency identification skills	2.900	3.166	3.033	18
5. Computer competence	2.526	2.416	2.336	30
6. Cost-benefit analysis skill	2.350	3.041	2.695	26
7. Counseling skill	3.300	3.208	3.254	7
8. Data reduction skill	3.050	3.125	3.087	14
9. Delegation skill	3.200	3.208	3.204	10
10. Facilities skill	2.950	3.166	3.058	16
11. Feedback skill	3.600	3.583	3.591	2
12. Futuring skill	2.900	3.041	2.970	21
13. Group process skills	2.900	3.583	3.241	9
14. Knowing the key concepts and variables that define an industry or sector	2.750	3.000	2.875	22
15. Intellectual versatility	3.550	3.458	3.504	3
16. Library skills	2.850	2.875	2.862	23
17. Model building skills	2.300	2.583	2.441	29

Table 4B (cont'd.)

Competency	Years of Experience		Cumulative Rank Means	
	≤ 10 $\bar{X}$	> 10 $\bar{X}$	$\bar{X}$	Rank
18. Negotiation skill	2.900	3.250	3.075	15
19. Objective preparation skill	2.950	3.375	3.162	12
20. Organization understanding	3.250	3.416	3.333	6
21. Organization behavior understanding	3.105	3.125	3.115	13
22. Performance observation skills	2.777	2.833	2.805	24
23. Personnel/human resource field understanding	2.894	3.130	3.012	19
24. Presentation skills	3.684	3.541	3.612	1
25. Questioning skill	3.388	2.958	3.173	11
26. Records management skill	3.222	2.782	3.002	20
27. Relationship versatility	3.421	3.250	3.336	5
28. Research skills	2.315	2.416	2.365	31
29. Training and development field understanding	2.578	2.695	2.636	27
30. Training and development techniques understanding	2.789	3.304	3.046	17
31. Writing skills	3.421	3.583	3.502	4

by the non-adult educators but ranked 22nd with a mean of 2.893 by the adult educators (Table 4A) .

Rank Order: Job Activities as Reported by ACE Graduates

Research Question 4: Which job activities were considered to be important? The graduates were asked to rate on a four-point Likert-type scale (1 = little to none, 2 = some, 3 = considerable, and 4 = very extensive) the job activities in the order of the importance of such activities in performing their jobs as professional adult educators. The job activities which had the mean of 3.0 and above, which corresponded to "considerable" importance on the four-point Likert-type scale, were considered important in the professional jobs of ACE graduates. The graduates indicated that twenty-two job activities were important in their jobs. The consistency observed was that five of the top ten ranked job activities were program related, but the other five were related to various job activities such as instructing, applying theories of adult learning, working with the community, facilitating groups, and long-range planning. It was also observed that the five least important job activities were related to research and interpretation of research (Table 5).

More information was also sought for Research Question 4: Which job activities were considered to be important to the respondents in the work of adult education? The graduates were divided into two groups: the adult educator and the non-adult educator groups. Both groups had graduates in the following professional

Table 5

Mean Rank Order of Job Activities as Reported
by ACE Graduates (N = 139)

Job Activity	Rank Order	$\bar{X}$	S.D.
Applying theories of adult learning	1	3.574	.707
Designing programs	2	3.527	.754
Administering programs	3	3.519	.743
Instructing	4	3.492	.654
Conducting program needs assessment	5	3.459	.629
Facilitating groups	6	3.456	.746
Evaluating programs	7	3.416	.649
Working with the community	8	3.330	.864
Long range planning	9	3.251	.863
Analyzing programs	10	3.243	.728
Marketing programs	11	3.240	.901
Evaluating participant performance	12	3.232	.941
Working with business	13	3.204	.911
Managing training and development	14	3.178	.941
Budgeting and financing	15	3.145	.889
Working with advisory committees	16	3.111	.859
Using media	17	3.104	.791

Table 5 (cont'd.)

Job Activity	Rank Order	$\bar{x}$	S.D.
Individual development counseling	18	3.055	.914
Education/training in business	19	3.040	.949
Proposal writing/grantsmanship	20	3.033	.897
Developing performance appraisals	20	3.000	.934
Instructional material writing	21	3.000	.874
Interpreting state and federal policies	22	2.952	.978
Assessing interests, aptitudes	23	2.943	.880
Interpreting research	24	2.913	.908
Career guidance	25	2.816	.910
Negotiating agreements	26	2.800	1.054
Statistical analysis	27	2.535	.949
Designing and conducting research	28	2.523	.952
Assessing basic education levels	29	2.512	1.052

positions: administrators, supervisors, and program directors; teachers, instructors, and trainners; and consultants and counselors.

The adult educators (N = 91) holding the above stated professional positions were asked to indicate the job activities they considered to be important in the work of adult educators. The job activities which had the rank mean of 3.0 and above, which corresponded to "considerable" importance on the four-point Likert-type scale, were considered important in the work of adult educators. There was a total of twenty-three job activities which had a mean of 3.0 or above. The top five ranked activities were related to applying theories of adult learning, designing programs, facilitating groups, instructing, and working with the community (Table 6A).

The non-adult educators holding the above stated positions were also asked to indicate the job activities they considered to be most important in their professional positions. The job activities which had the rank mean of 3.0 and above were considered important in the work of non-adult educators. There were a total of fifteen job activities which had a mean of 3.0 and above (Table 6B). The non-adult educators considered the same activities which were considered by the adult educators as important with the exception of the following job activities: proposal writing/ grantsmanship, which was ranked 8th ($\bar{X}$ = 3.435) by adult educators but ranked 22nd by non-adult educators; working with the community,

Table 6A

Mean Rank Order of Job Activities Considered Important by Adult Educators
by Professional Positions (Adult Educators N = 91)

Job Activity	Administrators Supervisors Program Directors $\bar{X}$	Teachers Instructors Trainers $\bar{X}$	Consultants Counselors $\bar{X}$	Cumulative Rank Means $\bar{X}$	Rank
1. Applying theories of adult learning	3.604	3.590	3.687	3.627	1
2. Instructing	3.541	3.619	3.500	3.553	4
3. Designing programs	3.541	3.500	3.812	3.617	2
4. Administering programs	3.729	3.136	3.562	3.475	7
5. Individual development counseling	3.062	3.181	2.937	3.060	17
6. Career guidance	2.347	2.954	2.666	2.655	27
7. Long range planning	3.416	3.454	3.437	3.435	8
8. Proposal writing/grantsmanship	3.166	3.000	3.250	3.138	15
9. Statistical analysis	2.562	2.681	2.687	2.643	29
10. Working with the community	3.625	3.318	3.625	3.522	5

Table 6A (cont'd.)

Job Activity	Administrators Supervisors Program Directors $\bar{X}$	Teachers Instructors Trainers $\bar{X}$	Consultants Counselors $\bar{X}$	Cumulative Rank Means $\bar{X}$	Rank
22. Designing and conducting research	2.456	2.727	2.750	2.644	28
23. Interpreting research	2.851	2.818	3.187	2.952	24
24. Evaluating programs	3.369	3.363	3.750	3.494	6
25. Evaluating participant performance	3.239	3.363	3.125	3.242	13
26. Conducting program needs assessment	3.391	3.500	3.375	3.422	10
27. Using media	3.086	3.045	3.062	3.064	19
28. Analyzing programs	3.413	3.181	3.125	3.239	14
29. Budgeting and financing	3.347	2.681	3.250	3.092	16
30. Developing performance appraisals	3.045	3.000	2.750	2.931	25

Table 6A (cont'd.)

Job Activity	Administrators Supervisors Program Directors $\bar{x}$	Teachers Instructors Trainers $\bar{x}$	Consultants Counselors $\bar{x}$	Cumulative Rank Means $\bar{x}$	Rank
11. Working with business	3.333	3.227	3.250	3.270	12
12. Interpreting state and federal policies	3.085	2.954	3.062	3.033	20
13. Marketing programs	3.326	3.272	3.687	3.428	9
14. Education/training in business	2.955	3.000	3.062	3.005	22
15. Working with advisory committees	3.297	2.863	3.750	3.303	11
16. Assessing basic education levels	2.652	2.772	2.250	2.558	29
17. Assessing interests, aptitudes	3.022	3.000	3.000	3.007	21
18. Managing training and development	3.173	2.952	3.375	2.979	23
19. Negotiating agreements	2.826	2.590	2.812	2.846	26
20. Facilitating groups	3.326	3.590	3.750	3.555	3
21. Instructional material writing	2.808	3.095	3.312	3.071	18

Table 6B

Mean Rank Order of Job Activities Based on Frequency
of Use by Professional Positions (Non-Adult Educators N = 33)

Job Activity	Administrators Supervisors Program Directors $\bar{X}$	Teachers Instructors Trainers $\bar{X}$	Consultants Counselors $\bar{X}$	Cumulative Rank Means $\bar{X}$	Rank
1. Applying theories of adult learning	3.647	4.000	3.777	3.808	1
2. Instructing	3.411	4.000	3.222	3.729	2
3. Designing programs	3.705	4.000	3.000	3.568	5
4. Administering programs	3.705	4.000	3.333	3.679	3
5. Individual development counseling	2.937	4.000	3.111	3.423	9
6. Career guidance	2.687	3.000	2.777	2.821	21
7. Long range planning	3.117	3.000	2.666	2.927	18
8. Proposal writing/grantsmanship	2.823	3.500	2.111	2.811	22
9. Statistical analysis	2.588	2.500	2.111	2.389	27
10. Working with the community	3.176	1.500	2.555	2.743	24

Table 6B (cont'd.)

Job Activity	Administrators Supervisors Program Directors $\bar{X}$	Teachers Instructors Trainers $\bar{X}$	Consultants Counselors $\bar{X}$	Cumulative Rank Means $\bar{X}$	Rank
11. Working with business	3.235	2.500	3.000	2.911	19
12. Interpreting state and federal policies	3.058	3.000	2.666	2.908	20
13. Marketing programs	3.176	2.500	3.222	2.966	17
14. Education/training in business	3.470	3.500	3.222	3.397	10
15. Working with advisory committees	3.117	2.000	2.444	2.520	28
16. Assessing basic education levels	2.294	1.500	2.555	2.116	30
17. Assessing interests, aptitudes	3.000	2.500	2.333	2.611	25
18. Managing training and development	3.352	2.500	3.111	2.987	16
19. Negotiating agreements	2.944	2.500	2.888	2.777	23
20. Facilitating groups	3.555	4.000	3.000	3.518	6
21. Instructional material writing	3.176	4.000	2.888	3.354	12

Table 6B (cont'd.)

Job Activity	Administrators Supervisors Program Directors $\bar{X}$	Teachers Instructors Trainers $\bar{X}$	Consultants Counselors $\bar{X}$	Cumulative Rank Means $\bar{X}$	Rank
22. Designing and conducting research	2.555	2.500	2.000	2.351	29
23. Interpreting research	3.000	2.500	2.666	2.722	26
24. Evaluating programs	3.500	4.000	2.888	3.462	7
25. Evaluating participant performance	3.444	4.000	2.888	3.444	8
26. Conducting program needs assessment	3.705	4.000	3.111	3.605	4
27. Using media	3.000	3.500	3.444	3.314	14
28. Analyzing programs	3.125	4.000	2.888	3.337	13
29. Budgeting and financing	3.352	3.500	3.000	3.284	15
30. Developing performance appraisals	3.312	4.000	2.777	3.363	11

which was ranked 5th ($\overline{X} = 3.522$) by adult educators but ranked 24th by non-adult educators; working with business, which was ranked 12th ($\overline{X} = 3.270$) by adult educators but ranked 19th by non-adult educators; working with advisory committees, which was ranked 11th ($\overline{X} = 3.303$) by adult educators but ranked 28th by non-adult educators; and developing performance appraisals, which was ranked 25th by adult educators but ranked 11th ($\overline{X} = 3.363$) by non-adult educators.

The ACE graduates were also categorized according to the years of experience which consisted of those who had ten or fewer years and those who had more than ten years of experience. The graduates were then grouped into adult educators and non-adult educators. Each group was asked to indicate how important each job activity was in the work of adult educators. The responses to the thirty job activities were tabulated and ranked according to the means. The job activities which received the rank mean of 3.0 and above, which corresponded to "considerable" importance on the four-point Likert-type scale, were considered important in the work of adult educators.

The educators indicated that a total of twenty job activities were important in their professional jobs. It was also observed the job activities which were related programs (eight job activities), and the others were related to applying theories of adult learning, long-range planning, working with the community, working

with advisory committees, facilitating groups, and budgeting and finance (Table 7A).

The non-adult educators indicated that a total of seventeen job activities were important in the jobs they were doing. These job activities were similar to those of the adult educators with the exception of career guidance, which was ranked 9th ($\bar{x}$ = 3.236) by non-adult educators but was ranked 24th by adult educators; proposal writing/grantsmanship, which was ranked 15th ($\bar{x}$ = 3.152) but was ranked 26th by the non-adult educators; and developing performance appraisals, which was ranked 12th ($\bar{x}$ = 3.157) by the non-adult educators but was ranked 21st by adult educators (see Table 7B).

Table 7A

Mean Rank Order of Job Activities Considered Important
by Adult Educators by Years of Experience
(Adult Educators N = 91)

Job Activity	Years of Experience		Cumulative Rank Means	
	≤ 10 $\bar{X}$	> 10 $\bar{X}$	$\bar{X}$	Rank
1. Applying theories of adult learning	3.513	3.693	3.603	1
2. Instructing	3.472	3.612	3.542	4
3. Designing programs	3.594	3.571	3.582	2
4. Administering programs	3.567	3.530	3.548	5
5. Individual development counseling	3.081	3.061	3.071	18
6. Career guidance	3.027	2.729	2.878	24
7. Long range planning	3.351	3.489	3.410	8
8. Proposal writing/grantsmanship	3.243	3.061	3.152	15
9. Statistical analysis	2.756	2.510	2.633	26
10. Working with the community	3.513	3.571	3.542	4
11. Working with business	3.243	3.326	3.284	12
12. Interpreting state and federal policies	3.194	3.938	3.566	3
13. Marketing programs	3.228	3.489	3.358	10
14. Education/training in business	3.058	2.938	2.998	20
15. Working with advisory committees	3.194	3.326	3.260	13
16. Assessing basic education levels	2.657	2.571	2.614	27
17. Assessing interests, aptitudes	2.971	3.041	3.006	19

Table 7A (cont'd.)

Job Activity	Years of Experience		Cumulative Rank Means	
	≤ 10 $\bar{x}$	> 10 $\bar{x}$	$\bar{x}$	Rank
18. Managing training and development	2.914	3.333	3.123	16
19. Negotiating agreements	2.628	2.857	2.742	24
20. Facilitating groups	3.514	3.448	3.481	6
21. Instructional material writing	3.000	2.958	2.979	21
22. Designing and conducting research	2.714	2.489	2.601	28
23. Interpreting research	2.972	2.857	2.914	23
24. Evaluating programs	3.428	3.448	3.438	7
25. Evaluating participant performance	3.171	3.306	3.238	14
26. Conducting program needs assessment	3.314	3.489	3.401	9
27. Using media	3.085	3.061	3.071	18
28. Analyzing programs	3.228	3.346	3.287	11
29. Budgeting and financing	3.000	3.224	3.112	17
30. Developing performance appraisals	2.914	3.021	2.967	21

Table 7B

Mean Rank Order of Job Activities Considered Important
by Adult Educators by Years of Experience
(Non-Adult Educators N = 33)

Job Activity	Years of Experience		Cumulative Rank Means	
	≤ 10 $\overline{X}$	> 10 $\overline{X}$	$\overline{X}$	Rank
1. Applying theories of adult learning	3.611	3.380	3.495	2
2. Instructing	3.500	3.238	3.369	6
3. Designing programs	3.388	3.428	3.408	4
4. Administering programs	3.333	3.571	3.452	3
5. Individual development counseling	3.277	2.850	3.063	16
6. Career guidance	3.722	2.750	3.236	9
7. Long range planning	2.500	3.190	2.845	21
8. Proposal writing/grantsmanship	2.611	2.761	2.686	26
9. Statistical analysis	2.388	2.333	2.360	30
10. Working with the community	2.666	2.952	2.809	23
11. Working with business	2.777	3.190	2.983	17
12. Interpreting state and federal policies	2.722	2.809	2.765	24
13. Marketing programs	2.666	3.095	2.880	18
14. Education/training in business	3.166	2.105	2.635	27
15. Working with advisory committees	2.444	2.952	2.698	25
16. Assessing basic education levels	2.111	2.476	2.293	30
17. Assessing interests, aptitudes	2.722	2.900	2.811	22

Table 7B (cont'd.)

Job Activity	Years of Experience		Cumulative Rank Means	
	≤ 10 $\overline{X}$	> 10 $\overline{X}$	$\overline{X}$	Rank
18. Managing training and development	3.000	3.350	3.175	10
19. Negotiating agreements	2.555	3.190	2.872	19
20. Facilitating groups	3.222	3.571	3.396	5
21. Instructional material writing	3.166	3.000	3.083	15
22. Designing and conducting research	2.222	2.545	2.383	29
23. Interpreting research	2.555	3.181	2.868	20
24. Evaluating programs	3.111	3.571	3.341	7
25. Evaluating participant performance	3.111	3.380	3.245	8
26. Conducting program needs assessment	3.500	3.550	3.550	1
27. Using media	3.333	3.000	3.166	11
28. Analyzing programs	2.944	3.368	3.156	13
29. Budgeting and financing	2.944	3.350	3.129	14
30. Developing performance appraisals	3.000	3.315	3.157	12

CHAPTER V

SUMMARY, CONCLUSIONS, AND RECOMMENDATIONS

The central purpose of this study was to identify a set of competencies which were used most frequently by the ACE graduates and the job activities which were important in their jobs. In order to achieve this purpose, data were obtained for the following research questions:

1. What are the current professional positions held by the adult educators who graduated from programs of studies in ACE at Michigan State University?

2. Are there a set of competencies which are common to adult educators regardless of the professional positions they hold?

3. Which competencies do ACE graduates use most frequently in performing their jobs?

4. Which job activities are considered to be important in the work of ace graduates?

The major dimensions of the study included the construction and validation of an adult educator questionnaire, the frequency distributions to identify the current professional positions held by the graduates, and the ranking of competencies and job activities in order to identify the competencies which were used most

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frequently by the graduates and the job activities they considered to be important in the work of adult educators.

Summary of Findings

The analysis of the data provided the following information related to the research questions and the stated purposes of the study:

The Current Professional Positions

The graduates consisted of two groups. The adult educators were ninety-one (67 percent) and the non-adult educators were thirty-three (33 percent). The adult educators held the following professional positions: forty-nine (37 percent) administrators, supervisors, and program directors; twenty-four (17.8 percent) teachers, instructors, and trainers; and seventeen (12.6 percent) consultants and counselors. There were thirty-three (33 percent) non-adult educators and they held the following professional positions: twenty (24.4 percent) were administrators, supervisors, and program directors; four (2.9 percent) were teachers, instructors, and trainers; and nine (6.6 percent) were consultants, counselors, etc. It was observed that in both groups (adult educators and non-adult educators) more graduates held administrative positions than those in teaching or consulting.

The Rank Order of Competencies

It was observed that nineteen competencies had the mean rank of 3.0 and above. This corresponded to 3 = "considerable extent"

on the four-point Likert scale. Therefore, there were nineteen competencies which were observed to be common to the adult educators.

It was also observed that the adult educators reported a total of seventeen competencies with the mean of 3.0 and above. There were, therefore, seventeen competencies which were used most frequently by the adult educators.

The non-adult educators indicated that the competencies which they used most frequently were similar to those of adult educators.

The graduates were also categorized according to years of experience (less than ten years and more than ten years). The adult educators of both categories indicated that they used a total of seventeen competencies most frequently. The non-adult educators indicated the same competencies with the exception of Data Reduction Skill, which was ranked 14th with a mean of 3.087 by the non-adult educators but was ranked 22nd with a mean of 2.893 by the adult educators.

Job Activities as Reported by ACE Graduates

The graduates indicated that twenty-two job activities were considered important in their jobs. The consistency observed was that five top ranked job activities were program related, followed by another five which were related to various job activities such as instructing, applying theories of adult learning, working with the community, facilitating groups, and long-range planning.

The graduates who were adult educators in various positions considered twenty-three job activities as being important in their work. The non-adult educators, however, indicated that only fifteen job activities were important in the work of adult educators. It was observed that the adult educators differed from non-adult educators in the ranking of some job activities. The adult educators as a group also (by work experience) differed from the non-adult educator group (by work experience) in the ranking of some competencies.

Conclusions

The review of related literature and the results of this study led to the following conclusions:

1. There are competencies which are common to adult educators, and they are identifiable. The competencies for the Training and Development field as presented in ASTD (Model for Excellence, 1983) are applicable to adult educators regardless of the professional positions they hold.

2. There are also job activities which are important in the work of adult educators and which are identifiable.

3. The competencies which are used most frequently and the job activities which are important in the work of adult educators can be determined through the use of the Adult Educator Questionnaire.

4. The competencies which were ranked higher by the ACE graduates were related to Presentation Skills, Writing Skills, Feedback Skills, and Understanding of Adult Learning.

5. The job activities which were related to program development were rated higher than those related to research.

6. There was no significant difference in the ranking of competencies by the adult educators who held different positions.

7. There was no significant difference in the ranking of competencies and job activities by the adult educators who had different work experience.

Recommendations for Further Study

The review of related studies, the information obtained from the doctoral and masters graduates, and the findings and conclusions of this study seem to lead to the following recommendations for the ACE graduate program:

1. A further study should be conducted in order to accurately categorize the professional positions held by the ACE graduates who are adult educators. Such a study should include the definition of an adult educator, and the identification and categorization of the current professional positions which are held by the ACE graduates.

2. This study should also be replicated in the near future in order to verify the validity of competencies which

have been identified as being used most frequently and the job activities which have been identified as important in the work of adult educators. The present study dealt with the identification of competencies which are used most frequently by the ACE graduates and the activities which they considered important in the work of adult educators. The study, however, did not examine why certain competencies are used most frequently, nor why certain job activities are important in the work of adult educators.

3. Research is needed in order to accurately cluster and group the competencies which have been identified as being used most frequently and the job activities which have been identified as being important in the work of adult educators. The groupings should include competencies in speaking and writing well, teaching groups effectively, organizing and directing complex administrative activities, and imaginative development of programming.

4. A study should be conducted which involves ACE doctoral and masters graduates in the evaluation of ACE graduate programs. Such an evaluation should include the usefulness of the core courses offered in the ACE graduate programs to graduates who are adult educators, the contribution of the core courses to the development of the competencies which are used most frequently by the ACE

graduates who are adult educators, and the development of job activities which are considered important in the work of adult educators.

5. The Department of Educational Administration should have an official definition of "adult educator". Such an official definition should help in maintaining consistency in defining the ACE graduates who are adult educators.

6. The Department of Educational Administration should examine the possibility of recommending certain interdisciplinary graduate programs to ACE graduate students. Based on the finding in this study that at least 37 percent of the graduates are in administrative positions (administrators, supervisors, and program directors), the department should consider a joint venture with the College of Business in management, program development, and program evaluation.

7. The findings and the conclusions of the study, which is being carried on by Dr. Cas Heilman, a Professor in the Department of Educational Administration at Michigan State University, should be compared with the findings and conclusions of this study. Such a comparison should aid in linking the two studies together. It should also aid in identifying the significant findings and conclusions which may not be in this study.

APPENDICES

A LETTER REQUESTING ACCESS TO EXISTING DATA

April 19, 1988

Peter K. Biwot
1451-D Spartan Village
E. Lansing, MI 48823

Dr. Cas Heilman, Professor
Adult and Continuing Education
407 Erickson Hall - M.S.U.
E. Lansing, MI 48824

Dear Dr. Heilman:

   This is to request access to your existing data on Training and Development through Adult and Continuing Education. The data used will be for the writing of the Ph.D. dissertation which will be submitted to the Department of Adult and Continuing Education at Michigan State University.

   Your consideration of this request is very much appreciated.

Yours faithfully,

Peter K. Biwot

PKB:rd

cc:UCRIHS
   Dr. Dick Gardner
   DR. Bob Rentschler

APPENDIX 2

ALUMNI SURVEY QUESTIONNAIRE

ALUMNI SURVEY

REGARDING TRAINING AND DEVELOPMENT
THROUGH
ADULT AND CONTINUING EDUCATION (ACE)

Over the past several years, there has been increased interest expressed by our graduate students regarding career paths in Training and Development within the private and public sectors. Generally, this area of specialization is described as: the planning, managing, developing and delivering education and training programs to people for the purpose of helping them obtain employment and/or improve their skills in their present employment.

In cooperation with the ACE faculty, we are conducting this survey to get the views our alumni and our present students regarding how we might improve the ACE program in this area of specialization. Even though you may not be directly involved in the area of Training and Development, we would appreciate your responses since many of the items relate to our overall program.

Please take a few minutes to complete this survey. As always your additional written comments are valued as supplemental information that can be used to highlight findings, personalize the data, and raise issues not covered within the survey.

Your participation is voluntary, you are free not to participate or may elect not to answer certain questions. Your participation is intended to be anonymous, therefore do not place your name or any other identifier on the survey.

When you have completed the survey, please return it in the enclosed stamped envelope, <u>within ten days.</u>

Thanks for your help,

Cas Heilman, Professor
Adult and Continuing Education
407 Erickson Hall
Michigan State University
East Lansing, MI 48824
Ph 517-353-8646

MARCH 1988

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ALUMNI SURVEY
REGARDING TRAINING AND DEVELOPMENT
THROUGH
ADULT AND CONTINUING EDUCATION

SECTION I: TRAINING AND DEVELOPMENT

Everything cannot be taught or learned through our formal academic program. Much professional development occurs on the job and through other formal and informal activities.

The following competencies have been identified for professionals in training and development. We are interested in the competencies you use on your job, and the contribution that your ACE graduate program had in helping you develop the competencies. Please rate each competency twice by responding to the following two questions;

    Column A: To what extent do you use this competency in performing your job?

    Column B: To what extent did your ACE graduate program contribute to your developing this competency?

Use the following scale for each of your responses.

    1 - Little to no extent   3 - Considerable extent
    2 - Some extent   4 - Great extent

Column A	COMPETENCY	Column B
Performed on Job		ACE Contribution
1 2 3 4	(1) **Adult Learning Understanding:** Knowing how adults acquire and use knowledge, skills, attitudes. Understanding individual differences in learning.	1 2 3 4
1 2 3 4	(2) **Audio/Visual Skill:** Selecting and using audio/visual hardware and software.	1 2 3 4
1 2 3 4	(3) **Career Development Knowledge:** Understanding the personal and organizational issues and practices relevant to individual careers.	1 2 3 4
1 2 3 4	(4) **Competency Identification Skills:** Identifying the knowledge and skill requirements of jobs, & tasks.	1 2 3 4
1 2 3 4	(5) **Computer Competence:** Understanding and being able to use computers.	1 2 3 4
1 2 3 4	(6) **Cost-Benefit Analysis Skill:** Assessing alternatives in terms of their financial, psychological, and strategic advantages and disadvantages.	1 2 3 4
1 2 3 4	(7) **Counseling Skill:** Helping individuals recognize and understand personal needs, values, problems, alternatives and goals.	1 2 3 4

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<u>Column A</u>						COMPETENCY	<u>Column B</u>			
<u>Performed on Job</u>							ACE Contribution			

1	2	3	4		(8)	**Data Reduction Skill**: Scanning, synthesizing, and drawing conclusions from data.	1	2	3	4
1	2	3	4		(9)	**Delegation Skill**: Assigning task responsibility and authority to others.	1	2	3	4
1	2	3	4		(10)	**Facilities Skill**: Planning and coordinating logistics in an efficient and cost effective manner.	1	2	3	4
1	2	3	4		(11)	**Feedback Skill**: Communicating opinions, observations and conclusions such that they are understood.	1	2	3	4
1	2	3	4		(12)	**Futuring Skill**: Projecting trends and visualizing possible and probable futures and their implications.	1	2	3	4
1	2	3	4		(13)	**Group Process Skills**: Influencing groups to both accomplish tasks and fulfill the needs of their membership.	1	2	3	4
1	2	3	4		(14)	**Knowing the key concepts and variables that define an industry or sector**: (e.g., critical issues, economic vulnerabilities, measurements, distribution channels, inputs, outputs, information sources).	1	2	3	4
1	2	3	4		(15)	**Intellectual Versatility**: Recognizing, exploring and using a broad range of ideas and practices. Thinking logically and creatively, without undue influence from personal biases.	1	2	3	4
1	2	3	4		(16)	**Library Skills**: Gathering information from printed and other recorded sources. Identifying and using information specialists and reference services and aids.	1	2	3	4
1	2	3	4		(17)	**Model Building Skills**: Developing theoretical and practical frameworks which describe complex ideas in understandable, usable ways.	1	2	3	4
1	2	3	4		(18)	**Negotiation Skill**: Securing win-win agreements while successfully representing a special interest in a decision situation.	1	2	3	4
1	2	3	4		(19)	**Objective Preparation Skill**: Preparing clear statements which describe desired outputs.	1	2	3	4
1	2	3	4		(20)	**Organization Understanding**: Knowing the strategy, structure, power networks, financial position, systems of a specific organization.	1	2	3	4

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Column A	COMPETENCY	Column B
Performed on Job		ACE Contribution

1 2 3 4   (21) **Organization Behavior Understanding**: Seeing organizations as dynamic, political, economic, and social systems which have multiple goals: using this larger perspective as a framework for understanding and influencing event and change.   1 2 3 4

1 2 3 4   (22) **Performance Observation Skills**: Tracking and describing behaviors and their effects.   1 2 3 4

1 2 3 4   (23) **Personnel/Human Resource Field Understanding**: Understanding issues and practices in other HR areas. (Organization Development, Organization Job Design, Human Resource Planning, Selection and Staffing, Personnel Research and Information Systems, Compensation and Benefits, Employee Assistance, Union/Labor Relations).   1 2 3 4

1 2 3 4   (24) **Presentation Skills**: Verbally Presenting information such that the intended purpose is achieved.   1 2 3 4

1 2 3 4   (25) **Questioning Skill**: Gathering information from and stimulating insight in individuals and groups through the use of interviews, questionnaires and other probing methods.   1 2 3 4

1 2 3 4   (26) **Records Management Skill**: Storing data in easily retrievable form.   1 2 3 4

1 2 3 4   (27) **Relationship Versatility**: Adjusting behavior in order to establish relationships across a broad range of people and groups.   1 2 3 4

1 2 3 4   (28) **Research Skills**: Selecting, developing and using methodologies, statistical and data collection techniques for a formal inquiry.   1 2 3 4

1 2 3 4   (29) **Training and Development Field Understanding**: Knowing the technological, social economic, professional, and regulatory issues in the field; understanding the role T & D plays in helping individuals learn for current and future job.   1 2 3 4

1 2 3 4   (30) **Training and Development Techniques Understanding**: Knowing the techniques and methods used in training; understanding their appropriate uses.   1 2 3 4

1 2 3 4   (31) **Writing Skills**: Preparing written material which follows generally accepted rules of style and form, is appropriate for the audience, creative, and accomplishes its intended purposes.   1 2 3 4

(32) To what extent does your job include activities related to Training and Development described as: "Working with the private and/or public sectors in the education and training of people for obtaining employment and/or improving their skills in their present employment." (circle one)

1 - not at all   3 - considerable
2 - somewhat   4 - that is my job

(33) To what extent are you interested, willing and able to participate in a variation of the Extern Program that would meet two days per month during the week to visit exemplary public and private sector Training and Development Programs. (circle one)

1 - not at all   3 - good possibility
2 - interested but couldn't   4 - no doubt about it

SECTION II: THE ADULT AND CONTINUING EDUCATION PROGRAM

(34) How would you evaluate the ACE program? Please grade the program components below using 4 - excellent, 3 - good, 2 - fair, and 1 - poor.

(a) ___ faculty expertise
(b) ___ faculty availability
(c) ___ advising
(d) ___ student/faculty interaction
(e) ___ instructional methods
(f) ___ admissions procedures
(g) ___ flexibility of the program
(h) ___ program requirements

(i) ___ challenging classes
(j) ___ convenient class schedules
(k) ___ range of course offerings
(l) ___ off campus courses

others, please describe
(m) ___
(n) ___
(o) ___

(35) The following are a list of general areas of interest and concern that have been expressed by students. We would like your response regarding how you felt about each that applied to you. You may wish to make additional comments regarding these items under the comment section on the last page of this questionnaire. Please circle the number that reflects your view by using the following:

1 - I was very negative   3 - I was positive
2 - I was negative   4 - I was very positive

(a)	The University	1	2	3	4
(b)	The College of Education	1	2	3	4
(c)	The Department of Educational Administration	1	2	3	4
(d)	The Adult and Continuing Education Program area	1	2	3	4
(e)	Registration	1	2	3	4
(f)	Parking	1	2	3	4
(g)	Statistics/research requirements	1	2	3	4
(h)	Library services	1	2	3	4
(i)	Bookstore services	1	2	3	4
(j)	Classrooms	1	2	3	4
(k)	Comprehensive exams for doctoral students	1	2	3	4
(l)	Doctoral dissertation proposals	1	2	3	4
(m)	Doctoral committees	1	2	3	4

In Column A, circle the number that best reflects your opinion of the IMPORTANCE of this item in performing as a professional in Adult and Continuing Education.

In Column B, circle the number that best reflects your opinion about the following statement.
"As a result of my ACE graduate program, I had the following levels of preparation": (remember that your program included more than only ACE courses)

SCALE: 1 - little to none   3 - considerable
       2 - some   4 - very/extensive

Column A Importance						Column B Preparation			
1	2	3	4	(36)	Applying theories of adult learning	1	2	3	4
1	2	3	4	(37)	Instructing	1	2	3	4
1	2	3	4	(38)	Designing programs	1	2	3	4
1	2	3	4	(39)	Administering programs	1	2	3	4
1	2	3	4	(40)	Individual development counseling	1	2	3	4
1	2	3	4	(41)	Career guidance	1	2	3	4
1	2	3	4	(42)	Long range planning	1	2	3	4
1	2	3	4	(43)	Proposal writing/grantsmanship	1	2	3	4
1	2	3	4	(44)	Statistical analysis	1	2	3	4
1	2	3	4	(45)	Working with the community	1	2	3	4
1	2	3	4	(46)	Working with business	1	2	3	4
1	2	3	4	(47)	Interpreting state & federal policies	1	2	3	4
1	2	3	4	(48)	Marketing programs	1	2	3	4
1	2	3	4	(49)	Education/Training in business	1	2	3	4
1	2	3	4	(50)	Working with advisory committees	1	2	3	4
1	2	3	4	(51)	Assessing basic education levels	1	2	3	4
1	2	3	4	(52)	Assessing interests, aptitudes	1	2	3	4
1	2	3	4	(53)	Managing training and development	1	2	3	4
1	2	3	4	(54)	Negotiating agreements	1	2	3	4
1	2	3	4	(55)	Facilitating groups	1	2	3	4
1	2	3	4	(56)	Instructional material writing	1	2	3	4
1	2	3	4	(57)	Designing and conducting research	1	2	3	4
1	2	3	4	(58)	Interpreting research	1	2	3	4
1	2	3	4	(59)	Evaluating programs	1	2	3	4
1	2	3	4	(60)	Evaluating participant performance	1	2	3	4
1	2	3	4	(61)	Conducting program needs assessment	1	2	3	4
1	2	3	4	(62)	Using media	1	2	3	4
1	2	3	4	(63)	Analyzing programs	1	2	3	4
1	2	3	4	(64)	Budgeting and financing	1	2	3	4
1	2	3	4	(65)	Developing performance appraisals	1	2	3	4

(66) Do you believe that a one-half to full-time internship of 6 to 12 credits should be required of ACE students?   (circle one)

YES   NO   IT DEPENDS (please explain)

SECTION III: PERSONAL

(67) My degree(s) in ACE is/are: (M A) (ED S) (Ph D)

(68) I completed my ACE degree(s) in: 19_____ 19_____

(69) I am a: (circle one) a. male b. female

(70) My age is: (circle one)
      a. Below 30 years
      b. Between 31 and 40
      c. Between 41 and 50
      d. More than 51

(71) I am a: (circle one) a. U.S. citizen b. Non U.S. citizen

(72) When I was in the program, I commuted approximately _____miles, one-way, to take campus classes.

(73) When working on my degree(s) I was:
    (circle the one that was most common)
      a. full-time student
      b. employed part-time
      c. employed full time

(74) My previous degrees were in: (major and institution) (complete all that apply)

    BA_____, Institution_____

    MA_____, Institution_____

    Ed S_____, Institution_____

(75) Please take a moment and describe your present or most recent full-time position.

Title:

Type of organization:

A few words of description:

(76) I have been in this <u>position</u> for: (circle one)
a. 0 - 3 years
b. 4 - 6 years
c. 7 - 10 years
d. More than 10 years

(77) I have been with this <u>organization</u> for: (circle one)
a. 0 - 3 years
b. 4 - 6 years
c. 7 - 10 years
d. More than 10 years

(78) My total work experience in training and development has been: (circle one)
a. none
b. 1 - 3 years
c. 4 - 6 years
d. 7 or more years

(79) FOR DOCTORAL COMPLETERS ONLY: How helpful were your research courses in completing the following segments of your dissertation? (1 - no help, 2 - some help, 3 - considerable help, 4 - very helpful

a. Designing the study   1 2 3 4
b. Analyzing the results   1 2 3 4
c. Reporting findings & conclusions   1 2 3 4

(80) COMMENTS:_____. Please write any comments, use the back page if necessary.

MANY THANKS FOR YOUR CONTRIBUTION! WE PLAN TO HAVE A SUMMARY
OF THESE RESULTS IN THE ACE FACILITATOR

MODELS FOR EXCELLENCE

Each competency is described in the following way:

EXAMPLE BEHAVIORS ILLUSTRATING LEVELS OF EXPERTISE

The COMPETENCY:	Basic:	Intermediate:	Advanced:
7. *Counseling Skill* . . . Helping individuals recognize and understand personal needs, values, problems, alternatives and goals.	— The T&D specialist uses a career planning kit as an aid in helping an individual who has sought career assistance. *She empathizes with the employee's quandry and*, based on the data from interest question-naires, *helps the employee explore* a variety of suitable new career directions.	— A participant in a leadership program is befuddled by survey feedback he has gotten from people he asked to assess his leadership style before the program. The program facilitator notices him puzzling over his data, asks if she can help, *listens to and acknowledges his concerns, and helps him interpret the* results and decide on a course of action.	— When asked to help an angry, shocked fifty-year-old ex-executive who has just been fired, the T&D specialist *gives him time to vent his feelings and concerns, and then helps channel his energy* into self-assessment, opportunity search.

This names and defines the competency

This section provides snapshots of the competency in action. These sample behaviors are only a few of *many* observable indicators of each competency. You can use these examples to help you and others better understand the competency and the general types of situations which may call for the competency. These examples can also help you assess your own or others general level of expertise in each competency area. Do you perform in ways similar to the basic, intermediate or advanced levels? What does the job/role require? These and other questions are easier to answer if you can think of the competency in *practice* (the examples) as well as in *theory* (the definition).

Note that portions of each example are italicized. Since several competencies often work together in situations, we have italicized the part of the example which most directly reflects the competency we are describing.

In the model, BASIC means having a general understanding of key principles and be able to function in simple, repetitive situations. INTERMEDIATE means having a depth understanding and skills and be able to function on a broad range of moderately difficult situations. ADVANCED means having a broad and deep understanding and skills and be able to function in complex, varied situations and be a model of subject matter mastery and skills.

There are at least two examples for each level of each competency. Let these be just a starting point for understanding and using the competencies in selection, assessment, development, career planning, organization design, and other activities you may engage in as a practitioner, manager, academician or student in the T&D field.

THE COMPETENCY MODEL FOR THE T&D FIELD

EXAMPLE BEHAVIORS ILLUSTRATING LEVELS OF EXPERTISE

The COMPETENCY:	Basic:	Intermediate:	Advanced:
1. *Adult Learning Understanding...* Knowing how adults acquire and use knowledge, skills, attitudes. Understanding individual differences in learning.	– When preparing visuals for a presentation, the T&D specialist assures that there are *no more than five to seven points on each slide.* – Knowing that support and review are *important after a learning experience,* the T&D specialist implements a series *of follow-up brochures which review key points and application ideas from* a course. – Etc.	– In order to assure that the managers participating in a management development program get the most out of their learning, the T&D specialist develops a half-day module on *how to self manage their learning process.* The module is *designed to be highly participative* and presents the latest findings about *how adults learn.* – When asked to develop a career development program, the T&D specialist develops a program which *uses participative methods, learning contracts, and continuing learning plans.* – A writer preparing a self-study manual for experienced nurses includes action planning modules at the end of each section to assure that the nurses have *a formal opportunity to relate the theories to their own practices.* – Etc.	– Microcomputer customers complain that the written instruction and information provided by local company reps is too confusing. The learning specialist reviews the manuals, interviews customers, observes local reps. He then *develops a workshop entitled "How to teach adults about microcomputers,"* complete with a set of job aids for interpreting the manuals. The course is given to all company reps. – A T&D specialist interested in exploring the applications of a broad range of learning theories to the training and development field, invites *ten leading learning theorists to be featured at a* one-day colloquium. The T&D specialist *identifies the issues to be addressed and moderates and provides commentary on discussions during the meeting.* – Etc.

THE COMPETENCY MODEL FOR THE T&D FIELD

EXAMPLE BEHAVIORS ILLUSTRATING LEVELS OF EXPERTISE

The COMPETENCY:	Basic:	Intermediate:	Advanced:
2. A/V Skill.... Selecting and using audio/visual hardware and software.	– When asked to provide media support for a product information course, the T&D specialist selects *overhead transparencies and flip charts* as the major visual aids because the content will be frequently revised and delivery sites are only equipped with overhead projectors and easels. – A modification is made in the power supply of a small computer necessitating a change in the manager training course. From information supplied by the engineering department, the T&D specialist *makes the appropriate changes to the overhead masters used* in the computer repair training courses, *and has new overhead materials produced* and distributed to all instructors. – Etc.	– Given a request for television support and an outline for a new three lesson course on operating a tire retreading machine, the T&D specialist *prepares a shooting plan for the shows and makes suggestions for added visual material* to improve the shows. – When a new two-projector programming device is purchased, the T&D specialist *retrays and reprograms all* current single projector shows, *making minor soundtrack and slide changes as* needed to revise the shows to the new format. – After a new company takes over a smaller one, the T&D specialist of the acquiring company designs and produces a *four-projector show* which portrays the acquiring company's capabilities and history. – Etc.	– When asked to *develop a media/presentation strategy for a sales training program which will be sold to companies across the country, the T&D specialist determines content for visual aids, designs and constructs a video feedback process, prepares scripts and supervises the shooting and taping of a 35mm slide-tape support program.* – Faced with the need to simultaneously introduce a new major product to the annual sales convention and to overseas distributors, the T&D specialist sets communications goals, supervises *concept and script development of a multi-projector presentation and videotapes in three languages, arranges and monitors production,* and then arranges logistics of each presentation. – A manager selects A/V equipment for a large new training center so that the center is capable of supporting *teleconferencing, interactive video, computer-aided instruction and a variety of film, slide, and multi-media needs.* He assures that the layout, engineering and loading capability of the facility will support *advanced equipment.* – Etc.

THE COMPETENCY MODEL FOR THE T&D FIELD

EXAMPLE BEHAVIORS ILLUSTRATING LEVELS OF EXPERTISE

The COMPETENCY:	Basic:	Intermediate:	Advanced:
3. *Career Development Knowledge....* Understanding the personal and organizational issues and practices relevant to individual careers.	– The T&D specialist develops a simple one page aid to help individuals *identify their personal skills, values, and career goals.* – A management trainee has trouble defining a career path. The T&D specialist helps her see that it is at least as *important to be able to describe the criteria for selecting jobs as it is to know the career moves to plan for in the future.* – Etc.	– The organization has adopted upward mobility policies. The T&D specialist works with groups of clerical people *to help them analyze skills, life values, goals and to identify possible career paths.* – After a major reorganization, the T&D specialist *changes the company career information booklet to reflect the changes. She also notes the potential impact of the changes on career opportunities in the company.* – The T&D manager *discusses career issues with individuals in her department at their request.* She provides feedback on how she sees their skills, style and visibility; guides them through self-assessment and goal setting; recommends resources to use for information or development; and provides various kinds of development support. – Etc.	– Management has previously given no support to an existing career development program and actively resists participating. The T&D specialist *evaluates the current program against several state-of-the-art programs, incorporates new career development methods and techniques, and implements a plan which is accepted at all levels of management.* – Management requests a career development *strategy proposal which will allow people to move laterally and vertically.* The T&D specialist identifies the key competency requirements of all departments and management levels and recommends a *competency-based promotion strategy which will enable people to move across divisions.* – In a growing organization, goals are established for succession planning to achieve management continuity. As part of this effort, the T&D specialist develops an assessment center program which helps assess core management skills and which also includes a *career planning module which, among other things, helps participants consider whether or not they really want to move up in the organization, make lateral moves, stay in their current job, or take other career steps.* – Etc.

THE COMPETENCY MODEL FOR THE T&D FIELD

EXAMPLE BEHAVIORS ILLUSTRATING LEVELS OF EXPERTISE

The COMPETENCY:	Basic:	Intermediate:	Advanced:
4. Competency Identification Skills. . . Identifying the knowledge and skill requirements of jobs, tasks, roles.	– When writing a course on interpersonal skills for ticket agents, the T&D specialist *breaks the skills identified in the needs analysis into smaller units so* they will be easier to present and understand. – When asked to help develop a program to develop the math skills relevant to maintaining a computer, the T&D specialist first reviews the operations manual *and identifies those activities which require math skills.* – Etc.	– Given a list of competency requirements for marketing people in a large retail organization, the T&D specialist *develops behavioral examples of excellent performance that reliably and validly demonstrate various levels of* each competency. – After she reviews the list of tasks an airline pilot must perform, the T&D specialist points out *the skill and knowledge themes which cut across tasks.* – When a series of new accounting procedures is introduced to an auditing firm, the T&D specialist reviews the processes and works with an audit partner *to identify the knowledge and skills which the audit training program* must address to support the change. – Etc.	– When asked to help design a career development system for the Marketing function, the T&D specialist works with management and marketing experts to define what performance will characterize marketing excellence in the future. He then *helps identify the knowledge, and skills which underlie excellent performance.* These become the basis for subsequent decisions about the career program. – A large department which is anticipating heavy management turnover from retirement asks the T&D department to propose a strategy for developing managers internally. The T&D specialists assigned to the task interview current managers, review the department's long and short-range plans, study the successful managers who are most thought to be models for tomorrow, and *recommend the ten competencies which will be most valuable to the organization in the future.* – When a large sales department is decentralized and asked to add service to its responsibilities, the T&D specialist is asked *to help identify the new knowledge and skills which will be needed.* Since there are no models to study in the existing organization, she studies *several other companies whose sales organizations have similar challenges, and develops a competency model which is successfully used to hire and* develop new sales reps. – Etc.

THE COMPETENCY MODEL FOR THE T&D FIELD

The COMPETENCY:	EXAMPLE BEHAVIORS ILLUSTRATING LEVELS OF EXPERTISE		
	Basic:	Intermediate:	Advanced:
5. *Computer Competence*... Understanding and being able to use computers.	– After participating in a short training course about the computer, the instructor teaches *two people how to enter and edit data.* – After she has completed a course in the use of the computer in adult education, the writer *selects existing software to help her use the computer to provide drill and practice in a course module.* – Etc.	– When the media specialist is asked to convert a traditional classroom course to a *computer-aided course* suitable for individual instruction, she prepares *steps and a flow chart for writers to use* in preparing the program. – When she is told that the computer analysis of a set of data is incorrect, the instructor *debugs the program and teaches the learner how to interpret error messages* and thus save time in the future. – When a T&D manager is asked to help identify the potential uses of computers in the department, he discusses the long-run costs and benefits of *computer aided instruction, interactive computer video, and computer managed instruction* compared to the other learning modes his department would use if the computer were not available. – Etc.	– When management requests a computer assisted program to teach strategic planning to executives, the program designer designs an *interactive video program where the computer-assisted learning components access the company's marketing and finance data base.* – When a new computer is made available to the training department, a program designer *builds a relational data base of existing instructional material and develops a set of production guidelines which can be followed in the future to easily incorporate new modules into the system.* – When asked to evaluate a computer-based training program to train foremen across the country in supervising a new manufacturing process, the evaluator *develops computer-aided testing modules to incorporate in the program and selects and sets up the use of a statistical software package to process the data.* – Etc.

THE COMPETENCY MODEL FOR THE T&D FIELD

EXAMPLE BEHAVIORS ILLUSTRATING LEVELS OF EXPERTISE

The COMPETENCY:	Basic:	Intermediate:	Advanced:
6. Cost-Benefit Analysis Skill... Assessing alternatives in terms of their financial, psychological, and strategic advantages and disadvantages.	– When asked to *compare the costs and benefits* of an expensive in-house training program with the costs and benefits of a new commercially available program, the T&D specialist notes the *similarities and differences in objectives of the course and calculates the per person costs of each.* – When the training manager reviews a program, budget and financial report, he *identifies the areas where costs must be controlled.* – A media specialist estimates the cost of producing a 30-minute program on video. She then recommends film because *even though it will be more expensive to produce, it will be usable on existing equipment.* – Etc.	– During a critical stage of a needs analysis, the T&D specialist asks a cross-section of managers and technical experts to identify the areas where technical performance is weakest and to identify the costs to the organization of those weaknesses. Then *she compiles the results and uses them as a basis for recommending areas where training can have the most impact.* – When asked to advise whether a program should be cancelled or continued, a T&D specialist reviews financial and evaluation reports, assesses the extent it is achieving its objectives, and *compares the costs with performance on objectives.* – In a major presentation of a new instructional system, the marketer talks with his audience about the pricing of program *in light of the benefits which other companies in their industry have experienced from earlier versions of the program.* – Etc.	– As part of her annual report to management about the effectiveness of the T&D department, the manager works with department's accountant to *compute the direct and indirect costs of department-sponsored activities.* She then reviews the data on program impact which her evaluators have collected during and after each program, *quantifies that impact based on existing assumptions about the value of different kinds of behavior/attitude change to the company, and draws conclusions about the department's overall contributions.* – A T&D manager who must help quote a price for developing a new six module course for production supervisors, analyzes the costs associated with preparing a design, developing materials, piloting the program, packaging it, training the trainers, and conducting on-going evaluation. He *compares these costs with savings estimates from improved productivity and proposes a course price.* – Etc.

THE COMPETENCY MODEL FOR THE T&D FIELD

EXAMPLE BEHAVIORS ILLUSTRATING LEVELS OF EXPERTISE

The COMPETENCY:	Basic:	Intermediate:	Advanced:
7. *Counseling Skill*... Helping individuals recognize and understand personal needs, values, problems, alternatives and goals.	– The T&D specialist uses a career planning kit as an aid in helping an individual who has sought career assistance. She *empathizes with the employee's quandry* and, based on the data from interest questionnaires, *helps the employee explore* a variety of suitable new career directions. – When helping a non-exempt employee who has voluntarily sought career counseling and eagerly taken brief assessment inventory, the T&D specialist refers to the interpretation grid accompanying the inventory *and helps the employee interpret her scores.* – Etc.	– A participant in a leadership program is befuddled by survey feedback he has gotten from people he has asked to assess his leadership style before the program. The program facilitator notices him puzzling over his data, asks if she can help, *listens to and acknowledges his concerns, and helps him interpret the* results and decide on a course of action. – During a series of discussions with the training director of a large department, the consultant *finds out the director's concerns about* the organization and *helps her explore* several options for training department direction. – When counseling with an individual exploring potential career options, the T&D specialist *puts him through a guided imagery exercise as a way of gathering data* about the individual's career preferences. – Etc.	– When asked to help an angry, shocked fifty year old ex-executive who has just been fired, the T&D specialist *gives him time to vent his feelings and concerns,* and then *helps channel his energy into* self-assessment, opportunity search. – When helping a manager who has reluctantly asked his subordinates to complete a feedback questionnaire on his management practice, the T&D specialist first helps him *analyze and overcome his fears and resistance to the feedback.* Then he reviews the feedback *—helping the manager understand and internalize it* by asking him to think of critical events which the feedback seems to relate to. – A T&D specialist works with an executive who has just completed an assessment center to help her develop action plans for improving skills and modifying style. The executive is sensitive about the assessment results. The T&D specialist takes time helping her *air her concerns and goals,* asks for her *interpretation of the results, and helps set long- and short-term goals which the executive feels she can and wants to achieve.* – Etc.

THE COMPETENCY MODEL FOR THE T&D FIELD

EXAMPLE BEHAVIORS ILLUSTRATING LEVELS OF EXPERTISE

The COMPETENCY:	Basic:	Intermediate:	Advanced:
8. Data Reduction Skill... Scanning, synthesizing, and drawing conclusions from data.	– A program designer reviews the subject matter available for inclusion in a course on negotiating. He selects the *material which is most relevant to the* course objectives and purpose. – When asked to develop improvements to an existing program, the instructional writer *reads a program evaluation report, and develops clear conclusions* about what needs to be changed. – When asked to identify the best electronics course for the company's needs, the T&D specialist develops criteria for selecting a program, *reviews the two available programs against the criteria,* and recommends the course which is the best fit. – Etc.	– In order to assess the effectiveness of a new computer technology course, the T&D specialist *interprets test results* using standardized data provided for a comparable population. – Given data from a follow-up evaluation study of a management development program, *the evaluator scans the interview and observation data and separates the changes which are most likely due* to the influence of the program from those which were probably caused by other factors. – A T&D specialist sets out to assess the effectiveness of a sales training program. He reviews two years of *data from the organization's files (reaction sheets, appraisals, development plans, productivity data from branch offices that have and have not participated in the training)* and uses this data to prepare a report. – Etc.	– In order to prepare the strategic plan for training and development, the manager reviews a 2,000-page summary of ten year projections. He then *identifies the ten major new development issues which most of the agency's divisions will face.* – When she is asked to interpret the raw data from an ill-designed three-year study of the effects of entry level training on performance, the evaluator reviews factor analyses, correlation data, turnover data and performance appraisal results and *identifies the key redesign areas* makes recommendations for redesign of the program. – Etc.

THE COMPETENCY MODEL FOR THE T&D FIELD

EXAMPLE BEHAVIORS ILLUSTRATING LEVELS OF EXPERTISE

The COMPETENCY:	Basic:	Intermediate:	Advanced:
9. *Delegation Skill...* Assigning task responsibility and authority to others.	– An evaluator prepares guidelines for pulling data from a computer printout and *asks her secretary to do the data by synthesis.* – The T&D administrator *assigns responsibility for conducting* a needs assessment survey for the department's secretarial staff to her experienced clerical staff supervisor. – The T&D specialist prepares materials and trains foremen to conduct a basic first aid course. *Each foreman is delegated the responsibility for scheduling and teaching* basic first aid to all people on their crews. – Etc.	– A manager who does not trust one of her staff's ability to coordinate and manage projects for the department identifies her reasons for feeling uncomfortable about delegating work to that person. She then directly discusses her concerns with the employee and works out an "if this. . .then that. . ." *plan to progressively delegate greater levels of work autonomy.* – The T&D manager *asks one of his technical instructors to manage* a training project which includes planning, organizing, testing and monitoring the work of other technical instructors. He discusses the new project manager's fears and abilities and works with him to develop a support plan for the early stages of the project. – A program administrator *turns over the responsibility* for staging the general session of a conference over to a production company—but provides and negotiates very specific quality criteria. – Etc.	– A manager who is known for her design contributions to the T&D field recognizes that she does all the most exciting design work herself—even though her job is to manage ten people. She decides to *bite the bullet and delegate an attractive design project to one of her staff.* Furthermore, she works with that person to develop a quality criteria and provide support but stays out of the day-to-day work even though the work style of the designer is quite different than hers. – A manager whose three staff people have varying abilities to proactively manage their work develops a *strategy for each whereby he delegates work and then provides the different levels of* support appropriate for each person. His goal—and he tells them so—is to help them become progressively more able to make key decisions without his approval and review. – The T&D manager *delegates to a T&D specialist the responsibility* for reviewing, assessing and revising the training system for headquarters staff. This includes planning and scheduling courses, conducting needs assessment, recruiting and assigning instructors, marketing, logistics management and evaluation. *She works with the specialist* to develop clear goals and indicators to monitor and is direct about her performance expectations. – Etc.

THE COMPETENCY MODEL FOR THE T&D FIELD

EXAMPLE BEHAVIORS ILLUSTRATING LEVELS OF EXPERTISE

The COMPETENCY:	Basic:	Intermediate:	Advanced:
10. Facilities Skill . . . Planning and coordinating logistics in an efficient and cost effective manner.	– Given a request to secure space for a workshop of forty people which will require four breakout rooms, the T&D specialist reviews the workshop's activities and determines the room sizes and equipment required. – Knowing that the physical setting of a training room affects the learning environment, the facilitator rearranges a room so that chairs, easel, window location are more supportive of the informal, open mood she wants to establish. – The T&D specialist manages the ongoing relationship with a hotel whose space is used weekly for the company's training. He reviews space, equipment, power supplies and service available to assure they meet each week's specifications. – Etc.	– A conference coordinator collects lists of AV needs from speakers and then selects and manages an equipment vendor to provide all the equipment and technical support needed for a 300 person conference. – Using an on-line airline information service, the training administrator prepares master flight and ground transportation schedules for 25 trainees from across the country who will attend a local workshop. The schedules assure both efficient routing and discount pricing. – In preparation for a two-week conference in a single location where the participants will be housed in various hotels away from the conference site, the T&D coordinator arranges sleeping rooms and for the appropriate conference meeting space and hotel support. He keeps prices within his budget and gets assurances of quality service. – Etc.	– Given a rough floor plan of four rooms in existing training facilities, the T&D specialist reviews projected training and related space needs. He then prepares a design for renovation of space which integrates AV, lighting, writing boards and storage. The plan meets budget and "learning atmosphere" requirements. – Faced with immediately adding 650 tech service reps to an already overloaded facility, the T&D specialist rearranges load schedules, rents additional housing, and arranges meal service and transportation to permit smooth absorption of overload. – While working with a major hotel which will be the site of a technical training conference, the T&D coordinator sets up the plan for materials receiving and storage, power line changes, room setups to meet speaker specification, meal and break logistics and special check-in procedures. She also holds a special meeting for the hotel staff explaining who will be in the group and what quality of service they will expect. – A T&D manager is asked to help design and supervise the construction of a new training facility. He determines how the facility will be used over time, and what equipment, learning approaches, and political issues the faculty must support. Then he coordinates budget, staff, architects, contractors, and vendors throughout the construction. – Etc.

THE COMPETENCY MODEL FOR THE T&D FIELD

EXAMPLE BEHAVIORS ILLUSTRATING LEVELS OF EXPERTISE

The COMPETENCY:	Basic:	Intermediate:	Advanced:
II. Feedback Skill. . . Communicating opinions, observations and conclusions such that they are understood.	– After observing a trainee practice a series of manual operations, the T&D specialist *informs him that he has accomplished* each of the major activities listed on a testing checklist. – A writer developing a programmed instruction module prepares several paragraphs which will *provide helpful feedback to students selecting wrong answers to test questions.* – Etc.	– Six weeks after a training program, participants have reverted to their former practices. Realizing that management and work flow do not support the skills taught in the program, the T&D specialist *meets with management to communicate his observations of the situation.* They agree that a problem exists. – A program designer, remembering experiences he has had in the past where he has not *communicated course objectives* and content to those who will produce his program, meets regularly *with the writer and media specialist who will develop his new program.* In those meetings he talks about his ideas and gets their questions and ideas. By the time the program is ready, everyone *is on the same wavelength.* – Etc.	– When asked by the president of the organization to give feedback on his public-speaking skills, the T&D specialist clarifies the criteria he will use. He then observes the president's next speeches and communicates his observations—*supported by concrete examples of what the president did and said in his talks.* – A middle manager exhibits skepticism and challenges assessment center data. The T&D specialist *provides specific, concrete examples from several assessment exercises and from her own observations outside the center to support the conclusions.* – Etc.

THE COMPETENCY MODEL FOR THE T&D FIELD

EXAMPLE BEHAVIORS ILLUSTRATING LEVELS OF EXPERTISE

The COMPETENCY:	Basic:	Intermediate:	Advanced:
12. *Futuring Skill...* Projecting trends and visualizing possible and probable futures and their implications.	– Presented with an economic forecast for the next year, the T&D specialist roughly *predicts the impact on training needs* in his own company. – The T&D specialist is invited to present a session on the future uses of computer aided instruction. He *develops scenarios* illustrating new application of CAI.	– The T&D specialist is asked to review the strategic plan and to recommend the number of executives who will need to be developed to meet the company's needs in the next five years. *The T&D specialist prepares projections based on succession planning information and on* analysis of the human resource requirements implied in the strategic plan. – As part of the Training Department's strategic-planning process, the T&D specialist helps identify what changes in supervisory practices may occur in the next five years. Using a list of demographic changes as a starting point, he *develops two scenarios illustrating effective supervisory practices now and in five years.* – The T&D manager has been invited to be a member of a national advisory board for health care trainers and is asked to chair a sub-group on the future of health care training. *He prepares scenarios predicting changes needed in the competencies of health care trainers as* a result of trends in health care techniques and health care organizations. – Etc.	– The T&D manager has noticed that her organization has a history of being overly optimistic in its strategic planning and frequently has missed critical employee skill shortages and dramatic shifts in the general business environment. She *prepares scenarios of the HR problems the company will face if they continue to ignore labor projections and the potential impact of the changing business environment.* – The T&D specialist is asked to write a brief handout illustrating the implications of brain research for adult learning. She reviews the literature and writes a paper that *predicts several new directions that group learning will take* because of findings from brain research. – From a variety of forecasting and futuring sources, the T&D specialist *synthesizes a number of one, five and ten year scenarios for her company.* The scenarios accurately reflect probable trends and the critical forces facing the industry as a whole. – Etc.

THE COMPETENCY MODEL FOR THE T&D FIELD

EXAMPLE BEHAVIORS ILLUSTRATING LEVELS OF EXPERTISE

The COMPETENCY:	Basic:	Intermediate:	Advanced:
13. *Group Process Skills...* Influencing groups to both accomplish tasks and fulfill the needs of their members.	– A training group is hard at work in its second session when a new member arrives. The instructor *stops the task work briefly; provides for the introduction of the member to the group, and vice versa; sets up a bit of informal get-together process; and quickly orients the new member to the on-going task.* – In a large group meeting of people who have successfully worked together before, the facilitator conducts a series of *group involvement exercises and negotiates a "group contract" for the direction and goals of the meeting.* – In a discussion where some different points of view are beginning to develop some negative feelings among group participants, the facilitator *encourages the quiet participants to talk about their right to have a point of view.* The discussion then returns to an open, highly participative one. – Etc.	– A line manager asks the T&D specialist to work with her in planning and conducting better staff meetings. The T&D specialist observes one meeting, interviews a few staff members, and recommends various means for increasing *group participation which will lit the needs and styles of the group members* and the typical nature of the tasks. – At the end of a training program, the T&D specialist senses a reluctance of the group to end the strong relationships built up. She talks about this with *the group and allows members to talk about what the group and individuals in it have meant to them and how they* feel about leaving it. – In a continually disruptive classroom situation, the T&D specialist *allows the disruptive group to air their issues and then is honest about her expectations and their alternatives should they* choose not to cooperate. As a result, the general tension level in the group is reduced. – Etc.	– When asked to help a new task force learn the skills they will need in order to work together effectively, the T&D specialist *reviews and models several approaches for exploring ideas, reaching consensus, and managing conflict in a group.* – Having completed the "get-acquainted" phase with a new group, the facilitator finds that work on the task is being frustrated by a battle for control by three group members who are accustomed to being group leaders. *Understanding what is happening, the facilitator stops the task work, helps the group identify what is going on, leads them to a resolution of the problem, and gets them back to the task with all parties feeling they have been heard and are committed to proceeding.* – Etc.

THE COMPETENCY MODEL FOR THE T&D FIELD

EXAMPLE BEHAVIORS ILLUSTRATING LEVELS OF EXPERTISE

The COMPETENCY:	Basic:	Intermediate:	Advanced:
14. Industry Understanding... Knowing the key concepts and variables that define an industry or sector (e.g., critical issues, economic vulnerabilities, measurements, distribution channels, inputs, outputs, information sources).	– The T&D specialist describes *the major types of services currently being offered by insurance companies in her area* and reviews her own company's product training to see if it is up to date in product knowledge for these areas. – In a meeting with hospital administrators, the hospital training consultant *overviews trends in hospital equipment changes and points out their implications for training and development.* – In a discussion with a potential client from the banking industry, the T&D specialist *describes the four key factors which influence the growth of savings and loan association.* – Etc.	– After reviewing analyses of and commentaries on recent legislation, the T&D specialist projects *the changes the legislation will cause in her company's industry.* After checking out her assumptions with key managers in her organization, she identifies the effects the changes will have on skill requirements. – Given the National Association of Broadcasters Code of Ethics and a summary of current issues, the T&D specialist prepares a set of case studies for a broadcaster's counsel of ethics. The *cases reflect a broad range of situations facing people in that industry.* – A writer preparing an interactive video-based agency orientation program develops a module describing *the place of the agency in the governmental system and teaching people how public sector organizations are unique.* – Etc.	– A consultant develops a proposal to design a development strategy for coal mine supervisors. The proposal reflects *an indepth knowledge of the issues facing the energy industry in general and the coal industry in particular.* Recommendations focus on the coal mining industry's actions which most can improve management productivity measures. – From a broad range of industry sources, the T&D specialist identifies five possible directions the industry could take. The scenarios *reflect many subtle forces facing the industry as a whole.* – Etc.

THE COMPETENCY MODEL FOR THE T&D FIELD

EXAMPLE BEHAVIORS ILLUSTRATING LEVELS OF EXPERTISE

The COMPETENCY:	Basic:	Intermediate:	Advanced:
15. *Intellectual Versatility...* Recognizing, exploring and using a broad range of ideas and practices. Thinking logically and creatively, without undue influence from personal biases.	– After reviewing *a new research report* about audio-accompanied computer-based instruction, the T&D specialist *decides to rewrite* one of his training modules to better use the media. – When asked to develop a course in counseling skills for a client department, the T&D specialist *explores the potential applications of several approaches and then adopts the best design* even though it is the one she is least familiar with. – Etc.	– The T&D specialist recognizes that the changing demographics and values of his prime training audience will affect the impact of his training programs. *Deducing that he must change his management development content to emphasize* more participative techniques, he incorporates them into his programs, *even though* his own management style and preferences remain primarily non-participative. – When presented with competing arguments by staff experts for the appropriate training methodology to use in a key engineering course, the T&D specialist *explores each position for its strengths and liabilities and tries to keep his own preferences for a classroom based instruction from biasing his decision.* – Etc.	– During one week, a program designer works with subject matter experts to *develop program outlines for courses in auditing, counseling, and fork lift operating. The course designer incorporates very different kinds of learning* activities as appropriate for each course. – When a management development specialist is asked to prepare a development strategy for the company's engineers, she spends time with experts in the engineering field and *realizes that subject matter will require a different analysis and design approach than she has used for management development.* She then works to grasp the key *principles in the field and explore appropriate training options.* – Faced with client departments who have drastically cut back in expenses for training due to recession, the T&D director reassesses his manpower needs and *explores a broad range of other opportunities.* He decides to seek temporary assignments for training staff in line departments and to train line managers to deliver several basic but staff-consuming programs even though both decisions will reduce his department size. – Etc.

EXAMPLE BEHAVIORS ILLUSTRATING LEVELS OF EXPERTISE

The COMPETENCY:	Basic:	Intermediate:	Advanced:
16. Library Skills. . . Gathering information from printed and other recorded sources. Identifying and using information specialists and reference services and aids.	– When asked to recommend a film for use in a conflict management course, the media specialist *calls her contacts at a major clearing house.* – When preparing the annual update of a "References" section of a course on adult learning, the writer *asks the company information specialist to secure articles that appear relevant.* – After being asked to prepare a resource list for an upcoming "Women in Management" course, the T&D specialist *works with a library specialist to access a computer time-sharing file of articles, books, and research studies on the topic.* – Etc.	– A T&D speciality responsible for the continuing education of accountants in a large CPA firm, fits at his computer every month to personally identify new trends and their implications for training content. He *searches authors, subjects and resources without the help of a library expert.* – In order to gather data for video-based case studies and simulations to be used in an executive development program, the T&D specialist realizes she needs information about how other companies are handling several key problems. She gives all the instructions a research-er needs for gathering *information from the Wall Street Journal Index, Abstract-ed Business Information Services, and a number of other computer-aided search services.* – Etc.	– When asked to develop a way to access a broad range of courses, books, journals, and reports and training manuals, the T&D specialist *sets up an informational retrieval system which uses the most up-to-date library science coding systems.* – A program designer is asked to develop a plan for continuous updating of a course to help scientists know state of the art genetic research. He asks the technical library to send copies of all articles and materials, scans an *on-line research data base for current and projected issues; initiates and jointly develops an on-going literature search plan* with the head information scientist. – When asked to do a needs analysis for a law firm, the T&D specialist interviews a cross section of lawyers in and outside the firm, formulates six key questions to *research in the literature, and asks a library specialist to gather articles, books, and computer-generated abstracts of recent articles related to* the key questions. – Etc.

THE COMPETENCY MODEL FOR THE T&D FIELD

EXAMPLE BEHAVIORS ILLUSTRATING LEVELS OF EXPERTISE

The COMPETENCY:	Basic:	Intermediate:	Advanced:
17. *Model Building Skills...* Developing theoretical and practical frameworks which describe complex ideas in understandable, usable ways.	– When a writer is asked to prepare an article explaining how attitudes affect behavior, he *adapts a four-box flow chart* he saw in a psychology text—using it to help him *graphically* overview the data for the article. – When a writer is asked to prepare materials for an employee orientation program, *she creates a map* illustrating the major purposes of each department and how they support and interconnect with each other. – Etc.	– When she is asked to develop a training program for sales reps which will address needs and present content identified in a comprehensive needs analysis, *the program designer organizes the data into units that will make sense for the learners and develops a simple flow chart illustrating the course content.* The flow chart is easy to remember and use. – When the T&D specialist is asked to develop a process for introducing and supporting new T&D programs into the organization, *she builds a model depicting the process flow.* – Etc.	– After a meeting with researchers who are investigating how to make computers more "friendly" to users, the T&D specialist notes that information and decision theorists are addressing some of the same problems that adult educators face. After a detailed exploration of that field, he *proposes a learning model which incorporates concepts* from information, theory, adult learning theory, and other sources. – After a review of many different models of engineering management, the program designer *creates a new model which will enable participants* in a course for new technical managers to quickly *see and understand* the major responsibilities of someone in an engineering management position. – In order to present complex information about data-based information systems to a naive audience which will have to use it, the writer develops many charts, tables and well-organized outlines which *include all the important data but organize it in a comprehensive way.* – Etc.

THE COMPETENCY MODEL FOR THE T&D FIELD

EXAMPLE BEHAVIORS ILLUSTRATING LEVELS OF EXPERTISE

The COMPETENCY:	Basic:	Intermediate:	Advanced:
18. *Negotiation Skill . . .* Securing win-win agreements while, successfully representing a special interest in a decision situation.	– A program designer meets with three busy subject matter specialists and *successfully secures agreement to hold the next meeting within three days.* – A group facilitator who wants *a group to reduce the number of items on its agenda successfully helps a group prioritize its actions for a meeting and drop several items from his list.* – Etc.	– On a large contract project where most of the program and implementation guides are complete, but the client has only paid one-third of the fees, the client becomes hostile about a slipped deadline and refuses further payment. The project manager finds the key decision makers, convinces them that they share responsibility *for the problem, refocuses on the common goal, and gets approval to proceed.* – When two T&D specialists vie for the same project, the manager suggests they *negotiate the decision.* They decide to each list the value of the project to them and its relationship to the other assignments. *They agree to use these criteria to assign the job to the person for whom it's the best fit.* – A T&D manager has been asked by a VP who is also a personal friend to relax the promotion criteria for a particular position so that he can be promoted into the T&D department. The T&D manager tactfully explains why doing this would not be in the best interests of the company, the VP, or the nominee. *The VP is left agreeing with the manager's position and feeling that his confidentiality will be respected.* – Etc.	– In a program design review with management, management wants to reduce the length of a new program from five to two days. The T&D specialist probes their reasons for wanting to shorten it, reminds them of the needs the program has been designed to address, points out the advantages and disadvantages he sees on both sides and gets support *for the program length til two of the days are designed as follow up and occur at least one month after the first three.* – When the company's executives decide to implement quality circles company wide, they hire an outside "expert" without consulting the training department. The director of training meets with several executives over lunch to discuss this issue and the department's desire to work on this effort. After listing the department's capabilities and describing the need for long-*term support and customization of the program, management agrees to ask the expert to work with the Training Department.* – A manager tells the T&D specialist that she wants to use two case studies from one of the T&D department's management programs in a staff meeting. The T&D specialist does not want to release *the studies because they constitute a major portion of a key course. He asks what the manager wants to achieve and then recommends another approach. The alternative is accepted.* – Etc.

THE   COMPETENCY   MODEL   FOR   THE   T&D   FIELD

EXAMPLE BEHAVIORS ILLUSTRATING LEVELS OF EXPERTISE

The COMPETENCY:	Basic:	Intermediate:	Advanced:
19. *Objectives Preparation Skill...* Preparing clear statements which describe desired outputs.	– Asked by the Personnel office to "find a film and conduct a 90-minute meeting for heads of offices on working with unmotivated workers," the T&D specialist draws on her past experience with the topic and drafts a letter which includes *a list of what people will learn in this session.* – A T&D specialist receives a detailed task analysis and knowledge/skill list for one segment of a toy assembler's job. He rewrites the task statements using the *language of behavioral objectives prescribed in established guidelines.* – Etc.	– A T&D specialist is asked to help develop guidelines for independent learning projects which will occur as follow-ups to a formal management development course. She develops designs which include *lists of learning objectives for each module. These objectives include indicators that managers can use on their own to assess their progress.* – A T&D specialist who has designed supervisory training programs before is asked to prepare a program to train new technical supervisors. He works with a taskforce of technical managers to identify special issues in technical supervision and *develops objectives for supervisory skills in the highly technical environment.* – When given a list of clearly defined task, their skill requirements and a description of the typical audience for a new program to train new technicians, the T&D specialist *writes objectives with observable behaviors, measurable performance criteria, and a description of conditions under which performance will occur on the job.* – Etc.	– A T&D specialist with little experience in the technical area is asked to prepare a training plan based on a 200-page needs analysis report of the training needs for a high technology group. She *develops detailed training objectives to pass the review of a technical advisory board.* – As part of a development strategy for auditors in a public accounting firm, the T&D specialist must develop objectives to guide the developer of course modules. Realizing that many outputs of successful auditing work are subjective, she develops objectives *which list a variety of indicators which can be used to measure each objective.* – A T&D specialist is asked to design a strategy for upgrading the skills of a decentralized staff in a rapidly changing, highly technical job. Working with subject matter experts and with people who know the company's strategy, the T&D specialist identifies the critical skills which must be developed and *prepares objectives for use in on-the-job training.* – Etc.

THE COMPETENCY MODEL FOR THE T&D FIELD

EXAMPLE BEHAVIORS ILLUSTRATING LEVELS OF EXPERTISE

The COMPETENCY:	Basic:	Intermediate:	Advanced:
20. Organization Behavior Understanding . . . Seeing organizations as dynamic, political, economic, and social systems which have multiple goals; using this larger perspective as a framework for understanding and influencing events and change.	– A writer preparing a budgeting module for a middle management self-study program, ends the section with a guide to help participants plan how they will use and introduce the budget techniques on the the job. *She offers suggestions for making changes acceptable and understood in the organization.* – The T&D specialist is to develop a job aid to train people in the use of a new company-wide expense voucher format. Knowing that this change will meet some resistance, *he builds in a rationale for the change which is likely to appeal to the needs of its primary users.* – Etc.	– When management asks for help in changing the organization culture from a reactive to a proactive mode, the T&D specialist helps identify the new knowledge, skills and attitudes required, but strongly points out that management practices and promotion criteria must *also change to support new employee behaviors.* – An evaluator notes that although a series of electronic workshops is successfully helping production engineers develop skills they need for incorporating microprocessors into new products, the number of products which use that technology has not significantly increased. *She proposes that other groups in the company may be blocking the new technology and recommends the skills training program be dropped unless the system's problems are resolved.* – Etc.	– After a take-over merger, the training specialist is asked to set up a series of sessions to help orient the managers of the acquired company to the philosophy of the new organization. Through a series of interviews with top managers from both companies, the T&D specialist *identifies their fears, concerns, and hopes and develops a program that addresses each but still has the terminal goal of getting acceptance to the new philosophy.* – The T&D specialist is asked to develop a training program to improve productivity. *Rather than immediately developing a program, he convinces key managers that productivity improvement may require some major changes in how people work.* He proposes to first identify productivity problems and then work with management to design a combined *training and organization change program.* – Etc.

THE COMPETENCY MODEL FOR THE T&D FIELD

EXAMPLE BEHAVIORS ILLUSTRATING LEVELS OF EXPERTISE

The COMPETENCY:	Basic:	Intermediate:	Advanced:
21. *Organization Understanding...* Knowing the strategy, structure, power networks, financial position, systems of a *specific* organization.	— Before submitting the department budget, the T&D manager *identifies other department managers who must review it*. He discusses the budget with them before he proposes it. — A program administrator schedules participation in a popular class to assure that each class contains supervisors from a *cross-section of company departments*. — Etc.	— When asked to identify future career options for professionals in the organization, the career specialist creates several scenarios of future work in the company. *These scenarios take the company's strategy, structure and culture into account.* — A T&D specialist works with representatives from Public Affairs, Public Relations and Employee Communication to develop a self-study review of company structure, policies, and procedures. — *Based on a thorough understanding of the company's direction and major current challenges,* the T&D manager lists ten major strategic challenges for the human resource development function. — Etc.	— The T&D specialist heads a study team to identify areas for productivity improvement in the company. Her study plan reflects an *indepth knowledge of where the greatest opportunities and leverage points are in the company.* — In a presentation of a costly proposal for executive development, the T&D specialist refers to *a broad range of data from the company's financial statements, budgets, and strategic plan.* — Etc.

THE COMPETENCY MODEL FOR THE T&D FIELD

EXAMPLE BEHAVIORS ILLUSTRATING LEVELS OF EXPERTISE

The COMPETENCY:

22. Performance Observation Skills... Tracking and describing behaviors and their effects.

Basic:	Intermediate:	Advanced:
– At the request of the Personnel department, the T&D specialist observes *the performance of the company's* mail sorters and *develops a list of the major tasks* involved in doing that job.	– At a manager's request, the T&D specialist spends two days *watching the manager's team develop a plan* to upgrade the feed systems on the MX-11B widget stamper; the T&D specialist writes a report on the group's ability to function as a team and using a standardized rating form, rates and critiques the interpersonal skills of each.	– In preparation for designing a conflict management program for executives, the T&D specialist *observes merger negotiations between representatives of major corporations. She develops an observation recording system which reliably identifies each person's verbal and non-verbal activity* in terms of who talks to whom, about what, and the impact that it seems to have on the meeting and the individuals included.
– While she is leading a fairly structured discussion of a modeling tape, the instructor *notices non-verbal signals* from one person that indicates he doesn't understand the concept being discussed. She stops the tape and asks further questions.	– When given a vague list of tasks which engineering consultants must perform, a specialist watches several superior performers work and then *defines and identifies observable and measurable performance criteria* and the variables which affect job performance.	– In a facilitated negotiation meeting with ten representatives from labor and management, the T&D specialist *identifies those who seem to accept the speaker's point of view, those who might accept the speaker's and those who may never accept the speaker's point of view.* He records the specific behaviors which have led to his conclusion and uses them as a basis for helping determine the reasons for each position.
– In order to determine training needs, a needs analyst *watches* an assembler work, compares what he does to a time-phased description of the tasks and subtasks, and *identifies areas which are not being performed according to standards.*	– With the permission of a group undergoing a team building session, the T&D specialist *observes the group at work and compiles a chart showing frequency of and lines of communication* between various members.	– Before he prepares a report describing the strengths and development needs of an executive who has just completed a series of assessment center activities, the assessor reviews *what the executive did in each exercise,* makes a judgment about how appropriate her performance was in each situation, and *identifies patterns of behavior across the situation.*
– Etc.	– Etc.	– Etc.

THE COMPETENCY MODEL FOR THE T&D FIELD

	EXAMPLE BEHAVIORS ILLUSTRATING LEVELS OF EXPERTISE		
The COMPETENCY:	Basic:	Intermediate:	Advanced:
23. *Personnel/HR Field Understanding...* Understanding issues and practices in other HR areas. (Organization Development, Organization Job Design, Human Resource Planning, Selection and Staffing, Personnel Research and Information Systems, Compensation and Benefits, Employee Assistance, Union/Labor Relations.)	– The T&D manager makes a presentation to a group of supervisors to explain how the T&D mission relates to the other missions of other personnel functions within the company. – The T&D manager lists the *human resource/personnel-related groups that meet frequently in his area. He keeps track of and posts the issues they address in their meetings.* – Etc.	– The T&D specialist writes a mission of the training and development department which shows overlapping concerns with other personnel areas and yet presents the unique domain of training and development in the organization. – *Knowing that new personnel information systems will allow much more sophisticated cataloging of development actions, the T&D manager talks with the head of personnel information and asks to help develop the program for that application.* – *Having stayed up-to-date on the state-of-the-art in performance appraisal and succession planning, the T&D specialist is able to link several training programs with these practices and to recommend how they can be more mutually supportive.* – Etc.	– After the T&D manager reviews the long-range personnel needs for the organization and gathers statistics about skills currently available in the organization, she *meets with the directors of compensation and staffing to determine what each function can do to assure that the right skills are available when they are needed.* – The T&D manager chairs and coordinates the work of a *task force of managers from the Compensation, Staffing, Labor Relations, and Personnel Research functions. Their task is to develop a strategic plan for Human Resources that presents an interpretation of the direction the HR departments will take.* – As part of an on-going HR planning group, the T&D manager reviews *professional development trends affecting a broad range of HR practices, briefs the group on more important trends, and, with the group, explores the potential impact of the trends on human resource projects in the immediate future.* – Etc.

THE COMPETENCY MODEL FOR THE T&D FIELD

EXAMPLE BEHAVIORS ILLUSTRATING LEVELS OF EXPERTISE

The COMPETENCY:	Basic:	Intermediate:	Advanced:
24. Presentation Skills... Verbally presenting information such that the intended purpose is achieved.	— When the T&D manager is asked to introduce the speakers in a one-day seminar on industry trends, *he presents personal tidbits which will interest the participants and reviews the skills which they bring to the session.* — While giving a *standard lecture* reviewing several management theories in a course for new supervisors, the instructor *personalizes the material with a story from his own experience and still covers the material in the allotted time.* — When asked to *present the results of a* well-designed training needs analysis to six branch managers who want to take action, the needs analyst *gets and keeps the groups attention by standing up, reviewing the major points she will cover and clearly presenting the data and its implications. Her eye contact remains with the group throughout the presentation.* — Etc.	— When he feels nervous early in a presentation to 100 people, the T&D specialist uses *deep breathing, relaxation and visualization techniques to help reduce his tension.* — When an instructor notices that several new employees with limited English-speaking skills are having a difficult time understanding *her standard presentation, she adjusts the lecture by* defining and discussing the confusing words and by pausing and checking understanding more frequently. — When asked to make a presentation to manufacturing managers reviewing the Training and Development services and courses available to the company, the T&D specialist works from a word outline, *customizes the presentation to focus on the major needs of the group, and responds without defensiveness to* occasionally skeptical questions from the audience. — Etc.	— An account executive representing a large T&D company has been invited to present his company's proposal for a major new training and evaluation program which will be used to develop employees across the country. He prepares a media assisted review of the *proposal, uses it to quickly review key points, then spends a good portion of the meeting listing, discussing, and responding to questions from the group. His responses are clear, address the issues, use language appropriate to the group, and convey confidence and professionalism.* — When making a *presentation at an annual conference to a group of senior professionals, the T&D specialist mixes graphics, handouts, personal stories and well-organized presentations of key points.* The attendees rate the presentation as exceptional in both content and delivery. — In a very tense meeting of top management to review the issues being raised in a key management development program, the T&D specialist *uses flip charts and stories to illustrate key points. She skillfully presents the issues and her recommendations for executive* action. The audience acknowledges that the issues should be addressed and agrees to meet in a problem-solving session. — Etc.

THE COMPETENCY MODEL FOR THE T&D FIELD

EXAMPLE BEHAVIORS ILLUSTRATING LEVELS OF EXPERTISE

The COMPETENCY:	Basic:	Intermediate:	Advanced:
25. *Questioning Skill...* Gathering information from and stimulating insight in individuals and groups through the use of interviews, questionnaires and other probing methods.	– Working with an out-of-date operations manual and a knowledgeable terminal operator, the T&D specialist *interviews the operator and gathers enough information to update the* manual. – The T&D specialist *follows an interview outline to gather demographic data* about potential users of training and development services. – In order to determine their level of satisfaction from attending an orientation session, the T&D specialist draws from a list of prepared questions to *interview participants individually and as a group.* – Etc.	– A T&D specialist who is training supervisors in interviewing skills stresses the importance of using *reflective skills like empathizing and active listening, in order to help interviewees disclose information during the interviews.* – The T&D specialist develops *a set of self-analysis questionnaires* to help people in a career exploration program discover their own needs, goals, interests and capabilities. – Etc.	– After the release of three well-liked foremen because of policy violations, the T&D specialist is asked to evaluate the training program which communicates company direction and philosophy. As part of the evaluation, she *designs a questionnaire which captures the true feelings of the workers even* though they are reluctant to express any opinions to management or the training department itself. – In preparation for designing a maintenance course for a new computer in the last stages of product development, the T&D specialist *questions reluctant design engineers, harried manufacturing production engineers, and taciturn quality control specialists to find out what the repair procedures will be* when the product is released three months hence. The T&D specialist gets enough accurate information to help the technical writers prepare the operations manuals. – During a key segment of a training program, the T&D specialist senses serious resentment in the audience. *Using carefully phrased, probing questions he draws from the group the* underlying reasons for their attitude and is able to diffuse the situation. – Etc.

THE COMPETENCY MODEL FOR THE T&D FIELD

EXAMPLE BEHAVIORS ILLUSTRATING LEVELS OF EXPERTISE

The COMPETENCY:	Basic:	Intermediate:	Advanced:
26. *Records Management Skill*... Storing data in easily retrievable form.	– A T&D specialist *maintains attendance and continuing education unit records for participants in all company training programs* and, following established procedures, prepares monthly reports for each operational unit. – A T&D specialist establishes an AV/ training materials resource center for training department staff. The services include *cataloging, and indexing current and new acquisitions.* – Etc.	– When asked to design an inventory system for equipment scheduling and maintenance, the T&D specialist identifies information required and *designs a system for gathering and storing information*. She then trains the department administrative assistant to organize information for reporting and scheduling purposes. – After participating in an external information management seminar, the T&D specialist *outlines the pros and cons of automated information storage and retrieval systems* for his department and briefs training peers at a monthly staff meeting. – A T&D specialist works with the word processor to *establish methods for entering and retrieving a list of job tasks* for a supervisory training program. – Etc.	– T&D specialist *develops recommendations to upgrade and automate the T&D department's record management system* so that periodic reports on cost effectiveness and attendance can be developed and used in planning and in reports to management. – A T&D specialist, working with the data processing department develops a *framework for storing and retrieving data* from an extensive task analysis of the organization. The data is known to have far-reaching implications in identifying training needs, and access *to the information in really usable forms is vital to the training department.* – Etc.

THE COMPETENCY MODEL FOR THE T&D FIELD

The COMPETENCY:	EXAMPLE BEHAVIORS ILLUSTRATING LEVELS OF EXPERTISE		
	Basic:	Intermediate:	Advanced:
27. *Relationship Versatility...* Adjusting behavior in order to establish relationships across a broad range of people and groups.	– During the few minutes before a session where participants from several different organization units will discuss what needs to be done to support the use of important new skills on the job, the T&D specialist *greets each person at the door and begins to make them comfortable about being there.* – Realizing that a difference of opinion exists between two groups and that one group is more defensive about its position, the instructor *shifts to a listening mode and spends time letting the defensive group air its frustrations.* – Etc.	– *After working with a group of repeat people* in a training class, where the course satisfaction ratings were high, the T&D specialist *meets with the company's Director of Finance* to begin to identify needs for a management development program. The director gets excited about the potential program and asks to shorten the time line for introducing it. – When working with a group of new trainers who are hesitant to take responsibility for their own learning and who prefer that the facilitator take a directive stance in leading class sessions, the T&D specialist *begins where they are by taking a directive position,* then gradually *moves to a non-directive style* as participants gain confidence and competence. – Etc.	– Management has decided to reorganize and has placed a previously line management controlled training program under the authority of the training department. The T&D specialist *involves the line manager in establishing quality control procedures and personally consults him throughout the transition.* The manager becomes a key supporter of the new structure. – During the development of an executive development plan where a large percentage of top management is anti-training, the T&D specialist implements a *strategy of meeting formally and informally with key executives* to discuss their concerns and visions for company. The executives ultimately provide a budget to fund a major new development initiative. – During a five-week executive development course in which three contenders for the presidency are present and initially unwilling to disclose their needs or ideas, the senior T&D specialist *builds a relationship with each individual and is even asked to help them develop consensus on a major company problem* that comes up for discussion during the program. – Etc.

THE COMPETENCY MODEL FOR THE T&D FIELD

EXAMPLE BEHAVIORS ILLUSTRATING LEVELS OF EXPERTISE

The COMPETENCY:	Basic:	Intermediate:	Advanced:
28. Research Skills . . . Selecting, developing and using methodologies, statistical and data collection techniques for a formal inquiry.	– The T&D specialist develops a pre- and post-questionnaire to assess *knowledge change that has occurred as a result of a series of seminars on the participative workplace.* – A non-exempt employee seeks advice from a T&D specialist on how to prepare for a supervisory position. The T&D specialist *selects standard interest and skill batteries to help the individual assess his development needs.* – The T&D specialist develops a true-false multiple choice *test to assess knowledge levels at the end of a computer-aided learning module on the basis of robot repair.* – Technical employees are frustrated by limited career options. The T&D specialist is asked to see if a job rotation system might make better use of and better develop their skills. As a first step *she selects generic inventories to help employees assess their skills.* – Etc.	– When the researcher is asked to evaluate the reliability of a questionnaire, he reviews the *different approaches for measuring reliability and determines that a test-retest approach using people trained to code responses will be most appropriate.* – The T&D manager prepares a *policy statement and guidelines for evaluation practices to be used for all formal training and development events.* – The T&D specialist develops and validates a questionnaire for participants to send to their boss, peers and subordinates before a program. This questionnaire helps them identify *how their skill and style are perceived by those they work with and to identify areas for development.* – Etc.	– When asked to show the effects of a training program on the productivity of a group of customer service reps, the evaluator recommends a nominal group technique for defining "productivity." She then *develops a pre- and post-measurement strategy which managers feel will gather useful data and which her research colleagues agree will be valid.* – The T&D specialist is asked to evaluate the impact of a program whose objectives include attitude as well as skill and knowledge development. She develops an observation checklist for supervisors and a self-report format which *assesses post-course knowledge, attitudes and skill levels.* – When asked to track the impact and identify the most successful ingredients of a multi-faceted program designed to help managers and employees develop a more open attitude toward change, the research specialist *develops an integrated research design which incorporates pre- and post-course questionnaires, analyzes project failures over time, and measures climate/attitude changes for all key groups. The design wins honorable mention in a key research journal.* – The T&D specialist develops a plan for a three-year evaluation of the organization's training series for executives. He *develops an evaluation strategy which tracks behavior change, participant reactions to programs and which compares program content with the organization's goals and strategic priorities and strategic weaknesses.* – Etc.

THE COMPETENCY MODEL FOR THE T&D FIELD

EXAMPLE BEHAVIORS ILLUSTRATING LEVELS OF EXPERTISE

The COMPETENCY:	Basic:	Intermediate:	Advanced:
29. *Training and Development Field Understanding...* Knowing the technological, social, economic, professional, and regulatory issues in the field; understanding the role T&D plays in helping individuals learn for current and future jobs.	– The T&D specialist regularly reads and refers to articles in the *T&D Journal* and *Training Magazine*. – The T&D manager notices an increase *in the articles and talks dealing with the application of Human Resource* accounting practices to T&D and begins to learn about HRA before it becomes an issue in his organization. – Etc.	– The T&D specialist makes a presentation to her manager which shows how her train the trainer programs *incorporate advanced training techniques.* – Based on her attendance at several *annual T&D conferences and her broad reading about what is happening in the T&D field*, the T&D specialist notes and discusses the implementations of a trend toward learning designs where the learner takes more responsibility for the objectives and for application decisions. – Etc.	– The T&D manager is asked to justify why the T&D function shouldn't be eliminated due to declining financial resources and increasing numbers of qualified potential employees. The manager *describes the range of contributions that training and development can make to organizations in* difficult times and convinces the organization to retain the function. – The T&D specialist leads a conference session on *issues and trends in the T&D field.* The audience consists of training managers of Fortune 500 companies. – Etc.

THE COMPETENCY MODEL FOR THE T&D FIELD

EXAMPLE BEHAVIORS ILLUSTRATING LEVELS OF EXPERTISE

The COMPETENCY:	Basic:	Intermediate:	Advanced:
30. Training and Development Techniques Understanding . . . Knowing the techniques and methods used in training; understanding their appropriate uses.	– In a presentation of a self-study supervisory development program, the T&D specialist *describes advantages and disadvantages of programmed instruction for this situation.* – In a presentation for new trainers, the T&D specialist develops a list of *commonly used training and development techniques and the advantages and disadvantages of each.* – Etc.	– As a result of hiring freeze, the T&D specialist *reviews the training techniques used throughout all divisions and* subsidiaries in the corporation. After studying course records and research findings, he develops a set of recommendations which indicate: (1) which courses must have a *live instructor using group interaction techniques;* (2) which courses could easily be converted to a *materials-based, self-instructional format;* (3) which should remain as they are. – A lecture-based course has only been partially successful, although the content is accurate and complete for participant needs. The T&D specialist reviews the attitude and interest problems and proposes *six other ways the material could be more successfully presented.* – Because an off-the-shelf training package includes case studies which do not quite fit the company's situation, the T&D specialist recommends several *alternatives to the case modules,* including role plays, demonstrations, participant development cases, guided imagery and other methods. – Etc.	– A T&D specialist must develop a nine-module self-study program on drugs and effects for physicians. She sees her task as clearly presenting – in depth – a great deal of information, but also keeping the audience interested. She develops and uses a *format that incorporates graphics, space, summaries, case examples, diagrams, and short but clearly written essays.* Retention rates are 90 percent after the pilot. – A T&D specialist who is preparing a guidebook for use as an aid in designing training and development programs, writes a *description of one hundred techniques used to help adults learn.* – In producing a multi-course program to train nuclear power plant technicians, the T&D specialist designs a program which incorporates *assessment, computer-aided instruction, workshops, mentoring projects, simulations, interactive video, field trips, case studies and role plays.* Each technique is selected because of its leverage in helping achieve program objectives. – Etc.

THE COMPETENCY MODEL FOR THE T&D FIELD

EXAMPLE BEHAVIORS ILLUSTRATING LEVELS OF EXPERTISE

The COMPETENCY:	Basic:	Intermediate:	Advanced:
31. Writing Skills . . . Preparing written material which follows generally accepted rules of style and form, is appropriate for the audience, creative, and accomplishes its intended purposes.	- When he is asked to *edit* a short manual written by a professional writer, the T&D specialist makes changes to assure the text conforms to generally accepted *rules* of grammar, punctuation and style. - Given a general content outline, a design, objectives, and rough draft, the T&D specialist *writes the script for a straight-forward ten-minute slide and tape program* about current issues in drug manufacturing. - A T&D specialist *rewrites the benefits section of a program brochure* to make it more relevant to the expected audience needs. - Etc.	- When given a topical outline, the T&D specialist *creates a coherent, precise and concise essay* for course background reading. - A writer is given a design, objectives, content and audience description for a course and is asked go write the student guide. She *develops an approach* which the audience will find interesting, *uses words familiar to the audience,* and *includes examples and stories to illustrate key points.* The pilot test shows interest and attention levels to be high. - Given a vague idea, the T&D specialist *writes the treatment, script, and storyboard* for an A-V presentation. - Etc.	- Given content outline, reference materials, and a helpful subject matter expert, the T&D specialist *writes branching programmed instruction materials that maintain reader interest and involvement.* - A T&D specialist *writes a research report* which proposes several new practices for the T&D field. A leading applied research journal accepts it with minor revisions. - The T&D specialist *writes a proposal to develop an expensive instructional system* for an out-of-town client. The proposal is the only information that line and staff managers in the client organization review in making their decision. The proposal is accepted with the comment "You clearly communicated our needs, the purpose and advantages of your program, and why we should work with you." - Etc.

APPENDIX 4

EMPLOYER CATEGORY

The respondents' employer categories were coded using the following adaptation from the Dictionary of Occupational Titles of the U.S. Department of Labor.

Category	Code
Government Sponsored	
Public school system	11
Community/junior college	12
Four-year college/university	13
City agency	14
County agency	15
State agency or Washington, D.C.	16
Federal agency	17
Other government unit or combination	18
Non-Government Sponsored	
Business or industrial firm	21
Labor organization	22
Independent college/university	23
Independent school	24
Religious organization	25
Other non-government organization	26
Self-Employed	30
Unemployed (student, retired)	40

APPENDIX 5

JOB CATEGORY CODES

The respondents' occupations were coded using the following adaptation from the Dictionary of Occupational Titles of the U.S. Department of Labor.

Category	Code
Education	
Administrators, supervisors, program directors	11
Teachers, instructors, trainers	12
Others: consultants, counselors, etc.	13
Occupations in law and jurisprudence	20
Occupations in religion and theology	30
Occupations in social work and welfare	40
Other occupations in professional technology	50
Clerical and sales	60
Occupations in medical services	70
Other occupations	80
Unemployed (retired, students, etc.)	90

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