



COMPETENCIES FOR PERFORMANCE AND LEARNING PROFESSIONALS



THE INSTITUTE
FOR PERFORMANCE
AND LEARNING

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PARTNERING WITH CLIENTS

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



ASSESSING PERFORMANCE NEEDS

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



DESIGNING CURRICULA

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



DESIGNING LEARNING EXPERIENCES

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



FACILITATING LEARNING

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



SUPPORTING TRANSFER OF LEARNING

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



EVALUATING LEARNING

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

Foreword

The Institute for Performance and Learning —Canada’s professional association focused on learning and performance in the workplace—enthusiastically shares these *Competencies for Performance and Learning Professionals* with you as a key resource for your growth as a professional in the field.

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

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

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

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

Foreword cont'd

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

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

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

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

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

Saul Carliner, Ph.D., CTDP
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Fellow of the Institute for Performance and Learning
Chair, Certification Advisory Panel, Institute for Performance and Learning

About The Institute for Performance and Learning

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

The mission of the Institute is to:

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

About Certification

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

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Acknowledgements

We gratefully acknowledge the many professional members of the Institute and its predecessor organizations, CSTD and OSTD, who voluntarily contributed countless hours over the past four decades to the development of the competencies for learning and development professionals as outlined in the Foreword. Without their efforts, this contribution to the field of training and development would not be possible.

Competencies for Performance and Learning Professionals

Louise Grummitt, CTDP, along with Benchmark colleagues Alison Mitchell, Greg Kozdrowski, CTDP, and Kathy Lee, CTDP, led the design team for the 2016 edition. They worked through the process of updating the competencies and added two new competency categories: *Partnering with clients* and *Designing curricula*.

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Acknowledgements cont'd

Training Competency Architecture (TCA) and Toolkit

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Competency Analysis for Trainers: A Personal Planning Guide (CAT), published by the Ontario Society for Training and Development (OSTD) First edition, 1976

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Introduction

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

Purpose

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

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

Key Terms

Competencies

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

Performance

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

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

Designing Curricula

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

Designing Learning Experiences

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

Introduction cont'd

Key Terms cont'd

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

Using the Competencies

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

As an individual contributor:

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

As a manager or supervisor:

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

All roles:

- Manage your career in the field.

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

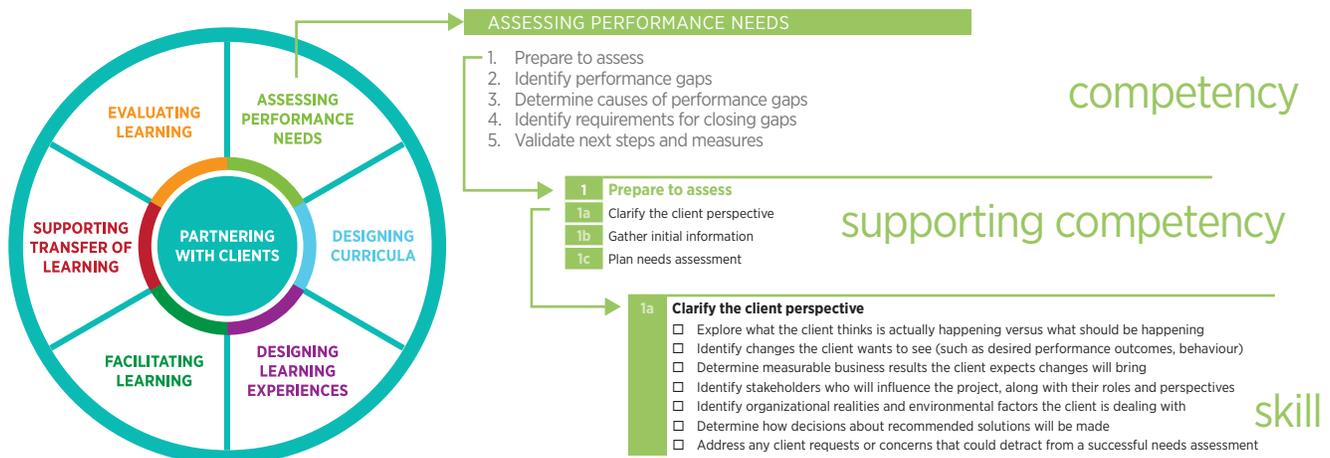
This document identifies key, core competencies for the profession; it is not exhaustive, nor does it address competencies needed in only one or two performance and learning roles.

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

Overall structure

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

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



What's in each category

Each of the seven competency categories is structured the same way, as illustrated below.

Designing learning experiences-1

Designing learning experiences

Introduction

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

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

Competent design of learning experiences ensures:

- learning objectives support desired performance outcomes and business measures;

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

Designing learning experiences-3

Designing learning experiences

Competencies and supporting competencies

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

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

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

Designing learning experiences-5

1 Conduct design analysis

Importance

The impact of mastering these competencies is you:

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

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

Designing learning experiences-7

1 Conduct design analysis

Supporting com

These skills (with check

- 1a **Confirm learn**
 - Review need
 - Review job
 - Confirm pe
 - Confirm pri
 - Confirm tar

Key outputs and assessment criteria

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

Key Outputs	Assessment Criteria
Desired performance outcome(s) and performance gap(s)	<ul style="list-style-type: none"> Analysis acknowledges any assessment of performance needs already conducted Gap between current and desired performance outcomes is clear Gap is stated in terms of specific performance outcomes Analysis confirms that performance gap(s) can be addressed through a learning solution and related transfer activities

The subsequent pages also identify typical outputs and the assessment criteria for these outputs.

Professional development

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

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

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

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

Partnering with clients

Introduction

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

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

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

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

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

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

Competent partnering with clients increases the likelihood you:

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

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

Partnering with clients

Competencies and supporting competencies

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

1 Demonstrate awareness of client organization

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

2 Support clients in making effective choices

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

3 Develop agreements with clients

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

4 Manage changes throughout a project

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

5 Interact effectively

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

1 Demonstrate awareness of client organization

Importance

The impact of mastering these competencies is you:

- gain or maintain credibility with client and other stakeholders;
- align learning with the vision, values, and direction of the organization; and
- contribute to realistic project plans that can be implemented efficiently.

Supporting competencies and skills

These skills (with checkboxes) contribute to mastery of the supporting competencies (in bold).

1a

Demonstrate awareness of the vision, values, and strategic direction of organization/work unit

- Conduct initial research before meeting with clients
- Describe the priorities of specific line(s) of business, function(s), or work unit(s)
- Identify challenges and opportunities in external environment(s) (such as impending legislation, business conditions, mergers and acquisitions)
- Assess implications of this knowledge for performance and learning

1b

Demonstrate knowledge of how work gets done in client organization/work unit

- Demonstrate knowledge of organizational structure and functions
- Demonstrate knowledge of key inputs and outputs
- Demonstrate knowledge of key organization processes
- Demonstrate knowledge of how roles communicate in the organization
- Demonstrate knowledge of how decisions get made (such as speed of decision making, who is involved, who has authority, key influencers)

1c

Demonstrate knowledge of client organization/work unit culture

- Use language and common acronyms of the organization
- Demonstrate knowledge of the norms, environment, conditions, and demographics of learners

1 Demonstrate awareness of client organization

2 Support clients in making effective choices

3 Develop agreements with clients

4 Manage changes throughout a project

5 Interact effectively

1 Demonstrate awareness of client organization

Key outputs and assessment criteria

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

Key Outputs	Assessment Criteria
Learning aligned with strategic direction	<ul style="list-style-type: none"> • Organization vision, values, and strategic direction supported • Specific links to vision, values, and strategic direction included where applicable • Current or imminent realities in external environment taken into account
Project plans	<ul style="list-style-type: none"> • Appropriate stakeholders involved based on knowledge of organization • Decision-making norms in organization reflected
Professional credibility	<ul style="list-style-type: none"> • Demonstrated understanding of the organization/work unit • Professional credibility acknowledged by clients and other stakeholders

1 Demonstrate awareness of client organization

2 Support clients in making effective choices

3 Develop agreements with clients

4 Manage changes throughout a project

5 Interact effectively

2 Support clients in making effective choices

Importance

The impact of mastering these competencies is you:

- provide effective and efficient learning solutions;
- avoid jumping to simplistic solutions and being swayed by current fads;
- gain or maintain credibility with client and other stakeholders; and
- adhere to the Code of Ethics for our profession.

Supporting competencies and skills

These skills (with checkboxes) contribute to mastery of the supporting competencies (in bold).

2a Propose solutions based on foundational and evolving best practices

- Seek information on evidence-based best practices from learning and other fields
- Explain current and emerging research regarding learning and performance
- Recognize the evidence that is needed to support ideas about learning and performance
- Challenge your own and others' assumptions that limit learning and performance
- Build empathy for the learners by asking, observing, and listening to their experiences (such as creating an empathy map)
- Leverage client, learner and other stakeholders' expertise and knowledge
- Support the right decision even if not in your own best interest, in adherence with our Code of Ethics

2b Consider a range of options

- Consider long-term as well as short-term implications
- Engage client, learners and other stakeholders in considering options
- Use an iterative approach to test ideas early and often
- Integrate different perspectives
- Synthesize and reorganize ideas
- Use constraints as an opportunity for creativity
- Create prototypes to test design ideas
- Assess options against established criteria
- Advocate for the best solution for the client, learner and organization
- Offer alternative solutions as appropriate, highlighting risks

2c Support stakeholders in promoting the solution within the organization

- Provide guidance and advice to help stakeholders prepare for key meetings on learning
- Provide data to support learning decisions within the organization
- Provide examples to support decisions about learning within the organization
- Provide key messages for change communications or emails on learning

1 Demonstrate awareness of client organization

2 Support clients in making effective choices

3 Develop agreements with clients

4 Manage changes throughout a project

5 Interact effectively

2 Support clients in making effective choices

Key outputs and assessment criteria

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

Key Outputs	Assessment Criteria
Effective and efficient learning solutions	<ul style="list-style-type: none"> • Based on accepted best practices in performance and learning • Learner's reality and underlying needs addressed • Collective expertise of multiple stakeholders reflected • Longer-term needs of organization taken into account
Acceptance of solutions within organization	<ul style="list-style-type: none"> • Client, stakeholders, and sponsor recognize any limiting assumptions • Client supported in making a persuasive case for an effective, efficient solution
Professional credibility	<ul style="list-style-type: none"> • Professional credibility acknowledged by clients and other stakeholders

1 Demonstrate awareness of client organization

2 Support clients in making effective choices

3 Develop agreements with clients

4 Manage changes throughout a project

5 Interact effectively

3 Develop agreements with clients

Importance

The impact of mastering these competencies is you:

- cost projects accurately;
- plan project tasks, timing and resource requirement accurately;
- anticipate potential problems, and put preventive and contingent actions in place; and
- meet or exceed client expectations for a project.

Supporting competencies and skills

These skills (with checkboxes) contribute to mastery of the supporting competencies (in bold).

3a Clarify client expectations regarding a project

- Ask questions to learn about the client's situation
- Ask questions to identify underlying concerns that might impact the work (such as positive or negative previous experiences with other learning experiences, organization changes, lack of employee engagement)
- Summarize and restate client expectations to ensure agreement
- Determine confidentiality requirements
- Determine client knowledge of the design and development process required to produce the work
- Determine measures of success

3a Gather information about previous similar projects

- Assess client willingness to share information with you
- Investigate past experiences with the client, sponsor, and stakeholders
- Investigate the process and outcomes of prior projects of similar type and scope
- Investigate the reliability of information provided on past projects

3a Clarify roles of client, learners, other stakeholders, and performance and learning professionals

- Identify who to involve and the nature of their involvement
- Identify client, learner, and other stakeholders' accountabilities (such as who is responsible, accountable, supporting, consulted, informed)
- Identify what you want from the client, learner, and stakeholders
- Clarify how decisions will get made
- Identify your role on the project and how your role affects interactions with others
- Identify communication protocols within your organization as well as the client organization
- Refer to other experts as necessary to supplement your own knowledge or source other areas of expertise (such as change management, recruiting, human resources, organization development)

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

Supporting competencies and skills cont'd

3d Negotiate assumptions and deliverables, as well as level of quality, timing, and cost

- Define project scope based on competencies in the assessing and designing categories
- Determine how client wants to prioritize trade-offs among cost, time, and quality
- Set protocol for scope changes
- Plan purpose and timing of meetings
- Determine how client would like to receive communication on status of the project
- Determine acceptance criteria at each stage of the deliverables

Key outputs and assessment criteria

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

Key Outputs	Assessment Criteria
Verbal and written agreements with clients	<ul style="list-style-type: none"> • Client expectations reflected • Stakeholders and roles identified • Assumptions, deliverables, timing and cost identified
Project plans	<ul style="list-style-type: none"> • Plan makes best use of organization resources • Project cost estimates accurate • Dates, dependencies, resources, durations, and costs identified • Schedule articulated
Professional credibility	<ul style="list-style-type: none"> • Professional credibility acknowledged by clients and other stakeholders

1 Demonstrate awareness of client organization

2 Support clients in making effective choices

3 Develop agreements with clients

4 Manage changes throughout a project

5 Interact effectively

4 Manage changes throughout a project

Importance

The impact of mastering these competencies is you:

- respond effectively to unavoidable changes;
- prioritize change based on impact on learning and performance;
- complete projects on time and within budget;
- manage your own workload and the workload of others on the project; and
- gain or maintain credibility with client and other stakeholders.

Supporting competencies and skills

These skills (with checkboxes) contribute to mastery of the supporting competencies (in bold).

4a **Develop realistic project plans**

- Define the activities required to complete the work
- Determine dependencies and sequence activities
- Estimate resources, durations and costs
- Develop a schedule
- Identify risks and plan preventive and contingency actions

4b **Keep projects on track**

- Manage time and scope of work to keep projects on schedule
- Keep client apprised of progress
- Communicate status and issues proactively to key stakeholders
- Communicate with team members and SMEs on work status
- Refer to project plan, and in-scope and out-of-scope items when making decisions
- Anticipate and proactively manage risks

4c **Negotiate changes in scope**

- Explore trade-offs among deliverables, timing, and costs
- Determine impacts on other organization projects if changes are made in this one
- Inform key stakeholders of impact of change request prior to implementing
- Obtain approval from the appropriate stakeholder

1 Demonstrate awareness of client organization

2 Support clients in making effective choices

3 Develop agreements with clients

4 Manage changes throughout a project

5 Interact effectively

4 Manage changes throughout a project

Key outputs and assessment criteria

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

Key Outputs	Assessment Criteria
Project change requests	<ul style="list-style-type: none"> • Change requests identify reasons for change and the impact on time, quality, cost • Change requests based on exploration of options with client and stakeholders
Project plan	<ul style="list-style-type: none"> • Project cost estimates are accurate • Dates, dependencies, resources, durations, and costs identified • Schedule articulated • Plan updated throughout project to guide work
Professional credibility	<ul style="list-style-type: none"> • Professional credibility acknowledged by clients and other stakeholders

1 Demonstrate awareness of client organization

2 Support clients in making effective choices

3 Develop agreements with clients

4 Manage changes throughout a project

5 Interact effectively

5 Interact effectively

Importance

The impact of mastering these competencies is you:

- get the input you need to come up with the best possible solutions;
- build commitment to implementation by involving others;
- help the client and stakeholders learn about the field of performance and learning; and
- gain or maintain credibility with client and other stakeholders.

Supporting competencies and skills

These skills (with checkboxes) contribute to mastery of the supporting competencies (in bold).

5a **Seek input from client, learners, and other stakeholders**

- Involve client, learners, and other stakeholders to gather information and different perspectives
- Engage client, learners, and other stakeholders to build commitment
- Ask questions that promote breakthrough thinking and generate insights
- Ask for and respond to feedback
- Collaborate effectively with people across borders, languages, cultures, and generations

5b **Present information and concepts clearly and succinctly**

- Determine client's current level of knowledge about learning and the design process
- Explain the alignment between learning and the business strategy and priorities
- Illustrate learning concepts, research and technology
- Establish expectations for time to full proficiency after training
- Use technical terminology of the client's field, industry, or industry segment
- Show respect for stakeholder's time

5c **Manage differences of opinion among stakeholders**

- Clarify issues
- Reframe disagreements in neutral terms
- Facilitate the development of solutions
- Identify and show sensitivity to the needs and boundaries of others
- Know when to compromise or stand firm, if there are different perspectives

5d **Act as an ambassador for your group**

- Demonstrate knowledge of foundational and evolving best practices
- Demonstrate awareness of current issues in the field
- Demonstrate knowledge of the range of services your group can provide
- Match services with the appropriate client and situation

1 Demonstrate awareness of client organization

2 Support clients in making effective choices

3 Develop agreements with clients

4 Manage changes throughout a project

5 Interact effectively

5 Interact effectively

Key outputs and assessment criteria

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

Key Outputs	Assessment Criteria
Interactions with clients and other stakeholders	<ul style="list-style-type: none"> • Client and stakeholder input is reflected • Learning concepts are explained clearly and succinctly • Alignment of learning to business strategy and priorities is explained • Client terminology is used • Discussion encourages participation and sharing
Feedback from client	<ul style="list-style-type: none"> • Verbal and written feedback from client is positive

1 Demonstrate awareness of client organization

2 Support clients in making effective choices

3 Develop agreements with clients

4 Manage changes throughout a project

5 Interact effectively

Assessing performance needs

Introduction

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

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

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

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

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

Competent assessment of performance needs ensures:

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

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

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

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

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

Assessing performance needs

Competencies and supporting competencies

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

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

1 Prepare to assess

Importance

The impact of mastering these competencies is you:

- focus on the needs of the learners and the organization, and avoid a “knee-jerk” response to requests for a learning solution;
- plan for an efficient and effective assessment of performance needs; and
- start building a partnership with your client.

Supporting competencies and skills

These skills (with checkboxes) contribute to mastery of the supporting competencies (in bold).

1a Clarify the client perspective

- Explore what the client thinks is actually happening versus what should be happening
- Identify changes the client wants to see (such as desired performance outcomes, behaviour)
- Determine measurable business results the client expects changes will bring
- Identify stakeholders who will influence the project, along with their roles and perspectives
- Identify organizational realities and environmental factors the client is dealing with
- Determine how decisions about recommended solutions will be made
- Address any client requests or concerns that could detract from a successful needs assessment

1b Gather initial information

- Determine extent to which the client's perspective is shared by other stakeholders
- Gather information to substantiate, or negate, the client's and shareholders' perspectives
- Identify political, economic, social, and technical factors affecting the organization
- Confirm desired performance has potential to impact business results
- Determine risk involved in implementing a proposed solution without conducting a needs assessment

1c Plan needs assessment

- Determine resources, time, and budget available for the needs assessment
- Define target audience to be addressed by the needs assessment
- Determine data required to identify causes of performance gaps and potential solutions
- Determine the most efficient, effective, and ethical methods for collecting data required
- Determine who should participate in providing data
- Plan sample size and distribution to ensure valid and reliable data
- Develop project plan for the needs assessment

1 Prepare to assess

2 Identify performance gaps

3 Determine causes of gaps

4 Identify solutions for closing gaps

5 Validate next steps and measures

1 Prepare to assess

Key outputs and assessment criteria

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

Key Outputs	Assessment Criteria
Plan for assessing performance needs	<ul style="list-style-type: none"> • Plan includes rationale for assessing performance needs, resources required, budget, target audience to be studied, data required, rationale for data collection method(s), who should provide data, sample size, and distribution of data • Plan includes comprehensive list of activities and timing, with clear roles and responsibilities plus sign offs, as well as communication to stakeholders • Plan describes proposed content of the needs assessment report • Plan addresses needs and concerns of client and other stakeholders • Plan is approved by client

1 Prepare to assess

2 Identify performance gaps

3 Determine causes of gaps

4 Identify solutions for closing gaps

5 Validate next steps and measures

2 Identify performance gaps

Importance

The impact of mastering these competencies is you:

- can base interventions for improving performance on accurate, unbiased data; and
- have data about the existing state so you can determine the impact of interventions to improve performance.

Supporting competencies and skills

These skills (with checkboxes) contribute to mastery of the supporting competencies (in bold).

2a

Gather data to determine current and desired performance outcomes

- Review documentation (such as job descriptions, process diagrams, incident reports, social media)
- Observe performance (such as user acceptance testing, client calls, daily routines)
- Design and administer questionnaires, using print, phone, or web technology
- Conduct structured interviews, in person or by phone
- Conduct focus groups, in person or using web technology
- Conduct other forms of participatory research methods (such as storytelling, “going native”, scientific experimentation)
- Address confidentiality and privacy issues
- Manage deviations from plan so data are not contaminated

2b

Conduct job, competency, or goal analysis to determine desired performance outcomes

- Determine which type of analysis (job, competency, or goal analysis) to conduct
- Work with subject matter experts (SMEs) and conduct job analysis to:
 - Determine functions and tasks for specific roles
 - Determine performance standards for tasks
 - Identify how to adjust roles to minimize overlap and clarify accountability for all key functions and tasks
- Work with subject matter experts (SMEs) and conduct competency analysis to:
 - Determine an overall structure or framework for competencies
 - Identify competencies and sub-competencies within the structure or framework
- Work with subject matter experts (SMEs) and conduct goal (topic) analysis to:
 - Identify specific tasks related to a goal or topic (such as teamwork, communication, supervision)
 - Determine performance standards for tasks

2c

Determine performance gaps and opportunities for improving performance

- Analyze data to identify specific performance gaps and opportunities for improving performance
- Determine possible cause-effect relationships among performance gaps
- Determine relative impact of performance gaps
- Maintain integrity of analysis while dealing with the reality of incomplete data

1 Prepare to assess

2 Identify performance gaps

3 Determine causes of gaps

4 Identify solutions for closing gaps

5 Validate next steps and measures

2 Identify performance gaps

Supporting competencies and skills cont'd

2d Identify desired performance outcomes and business measures

- Write statements describing:
 - The observable outcome desired
 - The conditions under which the outcome may be achieved
 - The business measures that will indicate whether the outcome has been achieved
 - The targeted level of that business measure
- Validate desired performance outcomes and business measures

Key Outputs and Assessment Criteria

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

Key Outputs	Assessment Criteria
Job, competency or goal analysis	<p>Appropriate method of analysis is used</p> <p>For job analysis:</p> <ul style="list-style-type: none"> • Identifies functions and tasks for specific roles • Identifies performance standards for tasks • Clearly states tasks using active and appropriate verbs <p>For competency analysis:</p> <ul style="list-style-type: none"> • Identifies competencies and supporting competencies within a structure or framework • Clearly states competencies using active and appropriate verbs <p>For goal (topic) analysis:</p> <ul style="list-style-type: none"> • Identifies specific tasks related to a goal or topic • Identifies performance standards for tasks • Clearly states tasks using active and appropriate verbs
Analysis of performance gaps and opportunities to improve performance	<ul style="list-style-type: none"> • Analysis identifies gap(s) between current and desired performance outcomes • Analysis is stated in terms of specific performance outcomes • Performance outcomes state observable outcome desired and conditions under which the outcome may be achieved • Analysis identifies business measures and targets that will indicate whether performance outcomes have been achieved • Analysis is based on accurate and reliable data • Analysis determines cause-effect relationships among performance gaps

1 Prepare to assess

2 Identify performance gaps

3 Determine causes of gaps

4 Identify solutions for closing gaps

5 Validate next steps and measures

3 Determine causes of performance gaps

Importance

The impact of mastering these competencies is you:

- can offer an explanation for performance gaps that is rooted in data collected;
- take a comprehensive approach to analyzing performance at the job, process, and organization level; and
- can later recommend learning and other performance solutions, and explain how they address causes of performance gaps.

Supporting competencies and skills

These skills (with checkboxes) contribute to mastery of the supporting competencies (in bold).

3a Determine job level causes

- Review data from documentation, observation of performance, structured interviews, focus groups, or questionnaires
- Analyze data to determine extent to which performance is impacted by:
 - Expectations that are unclear or seen as unrealistic
 - Feedback that is not specific and timely
 - Tools and resources that are not effective and efficient
 - Consequences that, on balance, do not support performance
 - Incentives that, on balance, do not support performance
 - Skills and knowledge of the performers, including skills for using technology
 - Ability of the performers

3b Determine process level causes

- Review data from documentation, observation of performance, structured interviews, focus groups, or questionnaires
- Analyze data to determine extent to which performance is impacted by:
 - Work processes or procedures that do not support desired performance outcomes (such as complicated to follow, inefficient, overlapping with other areas)
 - Technology that does not perform as expected or that users have difficulty using as intended

3c Determine organization level causes

- Review data from documentation, observation of performance, structured interviews, focus groups, or questionnaires
- Analyze data to determine extent to which performance is impacted by:
 - Organizational structure that does not support job-level performance
 - Desired performance outcomes that are not aligned with business strategies
 - Desired performance outcomes that are not aligned with vision and values

1 Prepare to assess

2 Identify performance gaps

3 Determine causes of gaps

4 Identify solutions for closing gaps

5 Validate next steps and measures

3 Determine causes of performance gaps

Key outputs and assessment criteria

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

Key Outputs	Assessment Criteria
List of causes of performance gaps	<ul style="list-style-type: none"> • Causes are based on accurate and reliable data, and sound analysis • List of causes considers all likely causes at a job, process, and organization level • List of causes identifies cause-effect relationships among the various causes

1 Prepare to assess

2 Identify performance gaps

3 Determine causes of gaps

4 Identify solutions for closing gaps

5 Validate next steps and measures

4 Identify requirements for closing gaps

Importance

The impact of mastering these competencies is you:

- identify learning and other performance solutions that address causes of performance gaps;
- take a comprehensive approach to identifying solutions at the job, process, and organization level; and
- make recommendations based on sound decision-making principles and the best available data.

Supporting competencies and skills

These skills (with checkboxes) contribute to mastery of the supporting competencies (in bold).

4a Identify potential solutions for closing performance gaps

- Set priority on performance gaps
- Identify performance solutions, as required, to close priority gaps (such as process improvement, leadership endorsement, role clarification, incentives, web-based tools, technology changes)
- Identify learning solutions, as required, to close priority gaps (such as facilitated classroom or eclassroom sessions, elearning, on-the-job training, job shadowing, job aids, peer support, videos)

4b Select learning and other performance solutions

- Determine criteria for evaluating alternate solutions (such as potential impact on performance gaps, cost to design, cost to implement)
- Identify technology (such as software and authoring tools) and issues (such as bandwidth, security precautions and network accessibility) for distributing information and learning
- Gather data to assess alternative solutions against the set of criteria
- Determine solutions that best meet the criteria
- Identify dependencies among all solutions recommended
- Ensure solutions are accessible (such as meeting needs of visual or hearing impaired, medical conditions, physical disabilities, learning disabilities)
- Identify when change management support is required
- Assess risks associated with implementing each of the preferred solutions

4c Plan to support transfer of learning and sustained performance

- Assess environment to determine feasible options for supporting transfer of learning
- Recommend initiatives to support transfer (such as communication of expectations, reminders, feedback mechanisms, follow-up activities, coaching/mentoring support, incentives)
- Determine resources required to support transfer of learning
- Determine how technology can support transfer of learning (such as automated reminders, online performance tracking, links to support)

1 Prepare to assess

2 Identify performance gaps

3 Determine causes of gaps

4 Identify solutions for closing gaps

5 Validate next steps and measures

4 Identify requirements for closing gaps

Supporting competencies and skills cont'd

4d Plan to evaluate transfer of learning and business results for learning solutions

- Identify pre-intervention (benchmark) performance outcomes and business measures
- Recommend how post-intervention performance and business results should be assessed against benchmark data
- Determine timing for evaluation and resources required

Key outputs and assessment criteria

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

Key Outputs	Assessment Criteria
List of other performance solutions in order of priority	<ul style="list-style-type: none"> • List identifies how each solution will address causes of specific performance gaps to achieve desired performance outcomes • List identifies dependencies on other solutions recommended • Solutions include descriptions of actions required to implement each solution • Solutions include estimate of resources and technology required
List of learning solutions in order of priority	<ul style="list-style-type: none"> • List identifies how each solution will address causes of specific performance gaps to achieve desired performance outcomes • List identifies dependencies on other solutions recommended • Solutions include descriptions of actions required to implement each solution • Solutions include an estimate of the resources and technology required
Plan for supporting transfer of learning	<ul style="list-style-type: none"> • Plan includes realistic solutions for transfer of learning to the workplace, based on desired performance outcomes • Plan identifies resources and time required to implement support for transfer of learning • Plan includes communication and follow-up activities • Plan identifies technology to support transfer of learning
Plan to evaluate transfer of learning and business results	<ul style="list-style-type: none"> • Plan identifies what data will be gathered and analyzed • Plan identifies when evaluation will be conducted • Plan includes benchmarks of pre-intervention performance and business results • Plan includes estimate of resources required to implement evaluation plan

1 Prepare to assess

2 Identify performance gaps

3 Determine causes of gaps

4 Identify solutions for closing gaps

5 Validate next steps and measures

5 Validate next steps and measures

Importance

The impact of mastering these competencies is you:

- build support for the effective implementation of learning and other performance solutions;
- identify which solutions will be implemented, and order of priority, in consultation with the client;
- set the stage for evaluation against specific business measures and desired performance outcomes; and
- identify priority tasks for learning.

Supporting competencies and skills

These skills (with checkboxes) contribute to mastery of the supporting competencies (in bold).

5a Prepare needs assessment report

- Explain purpose of needs assessment
- Describe process followed to conduct the needs assessment
- Summarize key findings of needs assessment
- Present desired performance outcomes and recommended business measures
- Describe implications of not addressing the performance gaps
- Present recommended learning and other performance solutions based on key findings
- Identify target audience and whether completing the learning solution is mandatory
- Present recommendations for supporting transfer of learning
- Present recommendations for evaluating solutions
- Present recommendations for how to assess learner reaction, learning objectives, and transfer of learning at an aggregate level
- Prepare draft implementation plan
- Prepare executive summary for the report

5b Present report to client

- Prepare agenda for meeting with the client and key stakeholders
- Present highlights of needs assessment report
- Facilitate discussion with the client and key stakeholders
- Respond to questions and address concerns
- Confirm how and when a decision will be made regarding recommendations

5c Secure sign-off and support for recommended solutions

- Incorporate modifications from client and key stakeholders
- Confirm with client the priority tasks or competencies for learning
- Validate implementation plan with client

1 Prepare to assess

2 Identify performance gaps

3 Determine causes of gaps

4 Identify solutions for closing gaps

5 Validate next steps and measures

5 Validate next steps and measures

Key outputs and assessment criteria

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

Key Outputs	Assessment Criteria
Needs assessment report	<ul style="list-style-type: none"> Report includes executive summary, purpose, process, key findings, potential performance outcomes and recommended business measures, implications of not addressing performance gaps, rationale for recommended learning and other performance solutions, target audience for learning, and whether learning is mandatory Report updated to include modifications based on feedback from the client and key stakeholders
Presentation of needs assessment report	<ul style="list-style-type: none"> Presentation begins with an agenda Presentation highlights recommended learning and other performance solutions based on key findings Presentation provides an opportunity for client and stakeholders to ask questions Presentation addresses questions asked or concerns raised by client and stakeholders

1 Prepare to assess

2 Identify performance gaps

3 Determine causes of gaps

4 Identify solutions for closing gaps

5 Validate next steps and measures

Designing curricula

Introduction

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

Designing a curriculum is important to do when:

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

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

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

Competent design of a curriculum ensures:

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

Introduction cont'd

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

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

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

Designing curricula

Competencies and supporting competencies

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

1 Identify goals, principles, and constraints

- 1a Consult with stakeholders to clarify business need and goals of curriculum
- 1b Establish overall design principles
- 1c Profile identified groups of learners
- 1d Consider potential of available technology to support curriculum
- 1e Identify interdependencies and constraints

2 Create preliminary roadmap for curriculum

- 2a Identify desired performance and other outcomes
- 2b Sequence performance and other outcomes
- 2c Identify potential learning and other performance solutions for achieving desired outcomes
- 2d Determine paths for identified groups of learners
- 2e Determine how technology and tools can support the curriculum

3 Design detailed roadmap for curriculum

- 3a Establish preliminary learning objectives for each curriculum component
- 3b Clarify format for each curriculum component
- 3c Determine delivery channel for each curriculum component
- 3d Develop initial content inventory for curriculum
- 3e Plan learning environment for curriculum

4 Prototype curriculum components

- 4a Design at least one example of each curriculum component as a prototype
- 4b Determine guidelines for ensuring consistency across subsequent design and development
- 4c Develop templates based on the validated templates and guidelines

5 Prepare to implement and sustain curriculum

- 5a Plan for implementation of curriculum
- 5b Plan for validation of curriculum
- 5c Plan for evaluating both the components and the curriculum as a whole
- 5d Plan for maintaining curriculum

1 Identify goals, principles, and constraints

Importance

The impact of mastering these competencies is you:

- base design on both the explicit and implicit goals of the stakeholders;
- follow established best practices in design;
- base design on the real needs of the various learner groups; and
- identify interdependencies and constraints early in the design process.

Supporting competencies and skills

These skills (with checkboxes) contribute to mastery of the supporting competencies (in bold).

1a **Consult with stakeholders to clarify business need and goals of curriculum**

- Determine the stakeholders who should be involved
- Ask questions to identify business need and measures the curriculum is intended to impact (such as generate revenue, contain expenses, comply with government/industry/organization guidelines)
- Identify impact the business need has on resources available to develop the curriculum
- Ask questions to identify potential goals (such as minimize time to competence, increase engagement, develop organization values, compete for talent, increase profile of learning function)
- Resolve areas of disagreement among stakeholders

1b **Establish overall design principles**

- Establish an appropriate guiding educational philosophy (such as progressive adult education, behaviourist adult education)
- Establish an appropriate guiding design approach (such as performance-centered design, universal design for education)
- Establish an appropriate guiding design process (such as design thinking or successive approximation model (SAM))
- Adapt the educational philosophy, design approach, and design process to the context of the curriculum
- Explain the rationale for the chosen educational philosophy, design approach, and design process

1c **Profile identified groups of learners**

- Profile various groups of learners (such as learners with or without previous experience, learners hired internally or externally, different demographic groups, learners with different goals)
- Explore the learner experience (such as physical work environment, interactions with others, available tools, capabilities of mentors)
- Identify learners' journeys before and after completing the curriculum (such as novice to power user, generalist to specialist)

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

Supporting competencies and skills cont'd

1d Consider potential of available technology to support curriculum

- Identify potential for producing learning experiences and materials offered by specialized authoring and audiovisual production technologies
- Identify potential for managing workflows and providing a content repository offered by enterprise content and learning content technologies
- Identify potential for managing, personalizing, and tracking learning experiences and materials offered by enterprise learning technologies
- Identify potential for ongoing communication and learning offered by social media
- Identify potential for distributing learning experiences and materials by devices available (such as smartphones, tablets, laptop computers)
- Identify organizational policies on use of technology that could affect design of the curriculum

1e Identify interdependencies and constraints

- Consider how location, geography, and number of learners impact the design
- Consider how timing, budget, resources, and quality requirements impact the design
- Consider how continuing education, certification, or legislative requirements impact the design
- Consider how other current and anticipated organization initiatives impact the design (such as product launches, changes to technology or regulatory requirements, role redesign)

Key outputs and assessment criteria

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

Key Outputs	Assessment Criteria
Documentation of goals, design principles, learner profile, impact of available technology, plus interdependencies and constraints	<ul style="list-style-type: none"> • List of goals reflects the perspectives of all stakeholders • Clearly stated design principles and adaptations to them along with rationale for choosing them • Distinct groups of learners are clearly profiled • Impact of current and future technology identified • List of interdependencies and constraints is comprehensive

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

Importance

The impact of mastering these competencies is you:

- structure and sequence the curriculum based on outcomes and goals;
- identify how and when to assess and validate proficiency;
- document learning best practices to guide the design; and
- ensure you consider how to sustain performance over time.

Supporting competencies and skills

These skills (with checkboxes) contribute to mastery of the supporting competencies (in bold).

2a Identify desired performance and other outcomes

- Gather data to determine current and desired performance and other outcomes (see **Assessing performance needs 2a**)
- Identify desired performance outcomes (see **Assessing performance needs 2d**)
- Identify other outcomes based on overall goals (such as confirm choice of profession or organization, work collaboratively with colleagues, pass a certificate or licensing exam)

2b Sequence performance and other outcomes

- Determine what sequencing is needed
- Set priority, determine pre-requisites and dependencies, and sort performance and other desired outcomes
- Determine stages or phases of learning within curriculum
- Identify assessment checkpoints along the way to confirm proficiency

2c Identify potential learning and other performance solutions for achieving desired outcomes

- Identify potential learning and other performance solutions for closing performance gaps (see **Assessing performance needs 4a**)
- Identify potential learning and other performance solutions for achieving other desired outcomes
- Select learning and other performance solutions to achieve outcomes (see **Assessing performance needs 4b**)
- Identify support required for learning (such as online forums, peer networking, crowd sourcing of materials, mentoring)
- Determine a realistic overall timeframe for learner completion of curriculum

2d Determine paths for identified groups of learners

- Determine what pathing is needed
- Determine points of entry to curriculum based on prior experience or learning
- Determine how each identified group of learners will progress through curriculum

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

Supporting competencies and skills cont'd

2e Determine how technology and tools can support the curriculum

- Determine the types of devices that will be supported (such as smartphones, tablets, in-class polling devices)
- Determine how technology will be used to store and deliver content
- Determine how technology will be used to promote communication and collaboration among learners, facilitators, managers, and others in the organization
- Determine how technology will be used to for assessment and testing
- Determine how technology will be used to personalize experiences and resources for different groups of learners

Key outputs and assessment criteria

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

Key Outputs	Assessment Criteria
Structured list of performance and other desired outcomes	<ul style="list-style-type: none"> • Performance outcomes state observable outcome and conditions under which outcome are achieved • Other desired outcomes are stated as concretely as possible • List of performance and other outcomes is comprehensive • List reflects needs and issues identified in the assessment • List is sequenced
Preliminary roadmap for the curriculum	<ul style="list-style-type: none"> • Roadmap is consistent with goals, interdependencies and constraints identified • Roadmap identifies any pre-requisites • Roadmap identifies all required and optional components of curriculum • Roadmap shows progression through curriculum • Roadmap shows alternate paths for identified groups of learners, where appropriate • Roadmap shows assessment checkpoints and identifies when learners should be proficient in specific performance outcomes • Roadmap shows timing of components and curriculum as a whole • Roadmap explains how technology will be used to support curriculum • Roadmap identifies support needed within the work environment • Roadmap reflects planned organization initiatives (such as product launches, changes to technology or regulatory requirements, role redesign) • All design choices can be justified based on overall goals, performance and other desired outcomes, resources available, and accepted best practices in performance and learning

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

Importance

The impact of mastering these competencies is you:

- link learning objectives and activities to performance and other outcomes;
- select the most effective and efficient formats and delivery channels for learning;
- make effective use of available resources to design and develop learning experiences and materials; and
- ensure learners can easily access components of the curriculum.

Supporting competencies and skills

These skills (with checkboxes) contribute to mastery of the supporting competencies (in bold).

3a Establish preliminary learning objectives for each curriculum component

- Write learning objectives for each curriculum component (such as a course, user guide, observation checklist, job aid. See *Designing learning experiences 2a*)
- Align learning objectives with performance and other outcomes
- Determine minimum criteria for successful completion of stages or phases of learning

3b Clarify format for each curriculum component

- Determine the purpose of each curriculum component (such as general awareness, skill practice, transfer of learning)
- Identify options for formats and their typical uses (such as a live or self-study course, user guide, job aid, online support resource)
- Identify expectations learners bring to the format (such as type of information included, how it's structured, writing style)

3c Determine delivery channel for each curriculum component

see *Designing learning experiences 3b*

- Identify options for delivery channel(s)
- Determine criteria for assessing alternative channels
- Ensure delivery channel(s) will meet accessibility requirements
- Select appropriate channel(s) based on criteria

3d Develop initial content inventory for curriculum

- Identify content to include for each component using preliminary learning objectives as a guide
- Determine criteria for assessing usability of existing resources (such as currency, accuracy, alignment with learning objectives)
- Review existing materials to determine what can be reused or adapted
- Determine whether third-party materials can be used as is or with modification
- Determine what new content needs to be developed specifically for the curriculum

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

Supporting competencies and skills cont'd

- 3e Plan learning environment for curriculum**
- Plan how learners will access curriculum components
 - Plan how learners and others (such as managers, learning and development group) will track progress through curriculum
 - Develop a visual roadmap for learners to follow
 - Consider how to foster the social component of learning, as appropriate
 - Plan for accessibility to address needs of all learners

Key outputs and assessment criteria

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

Key Outputs	Assessment Criteria
Detailed curriculum roadmap	<ul style="list-style-type: none"> • Roadmap identifies each component of the curriculum • Learning objectives include an observable behaviour condition and standard • Learning objectives are aligned with performance outcomes • Roadmap identifies an appropriate format for each component that addresses the learning objectives • Roadmap identifies a delivery channel for each component that addresses organization constraints and provides for easy access by learners • Proposed evaluation methods are appropriate to the level of learning objectives • All design choices can be justified based on overall goals, performance and other desired outcomes, resources available, and accepted best practices in performance and learning
Initial content inventory	<ul style="list-style-type: none"> • Inventory identifies which existing materials will be reused or adapted; which third-party materials will be used or adapted; and which materials will be designed and developed
Plan for learning environment	<ul style="list-style-type: none"> • Learners can easily access the components of the curriculum • Learners can see both the whole curriculum and the components • Learners and others can track progress through curriculum • Learners' accessibility needs are met

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

Importance

The impact of mastering these competencies is you:

- make improvements based on designing and testing prototypes;
- determine how to 'scale up' efficiently; and
- Ensure consistency across the various components of the curriculum.

Supporting competencies and skills

These skills (with checkboxes) contribute to mastery of the supporting competencies (in bold).

4a **Design at least one example of each curriculum component as a prototype**

see the *Designing learning experiences* competency category

4b **Determine guidelines for ensuring consistency across subsequent design and development**

- Determine standards for text (such as voice, use of terminology, editorial style)
- Determine standards for visuals (such as colours, style of illustration)
- Determine a standard approach for each component (such as job aids, user guides, videos, elearning, websites)
- Determine technology and elearning standards
- Incorporate corporate branding

4c **Develop templates based on the validated templates and guidelines**

- Develop templates for each type of component
- Develop templates for category of content within components (such as presentation of text or text and visuals, multiple choice questions)
- Build standardized text into templates (such as instructions and headings, other text that needs to be consistent)
- Ensure templates comply with guidelines for ensuring consistency
- Ensure templates comply with relevant technology and elearning standards
- Ensure templates can be used with the chosen authoring tools

1 Identify goals, principles, and constraints

2 Create preliminary roadmap for curriculum

3 Design detailed roadmap for curriculum

4 Prototype curriculum components

5 Prepare to implement and sustain curriculum

4 Prototype curriculum components

Key outputs and assessment criteria

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

Key Outputs	Assessment Criteria
Prototypes of curriculum components	<ul style="list-style-type: none"> • See related assessment criteria in <i>Designing learning experiences</i> competency category • Guidelines for ensuring consistency of design and materials are documented
Guidelines for ensuring consistency	<ul style="list-style-type: none"> • Identify definitions and preferred uses of terms for curriculum • Identify the preferred stylistic choices for curriculum • Identify style guide and dictionary as primary sources of resolution on terminology and style
Templates	<ul style="list-style-type: none"> • Provided for each major curriculum component • Provided for each category of content within components • Comply with guidelines for ensuring consistency • Can be used with the chosen authoring tools for the curriculum • Templates comply with relevant technology and elearning standards

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

Importance

The impact of mastering these competencies is you:

- implement the curriculum successfully;
- ensure learners transition easily from previous to new curriculum; and
- maintain and sustain the curriculum over time.

Supporting competencies and skills

These skills (with checkboxes) contribute to mastery of the supporting competencies (in bold).

5a Plan for implementation of curriculum

- Determine scope, budget and timeline for implementation
- Plan for the organization structure and resources required to deliver curriculum
- Plan for staged implementation, considering when various components should become available
- Plan for transition of those who have started an earlier version of the curriculum but have not yet finished
- Determine when and how the previous curriculum will be phased out
- Plan for technical and tutorial support for the curriculum (such as in-person support for self-study components)
- Advise on communications and marketing activities
- Test technology and other logistics

5b Plan for validation of curriculum

- Determine which components of curriculum need to be validated
- Determine the best approach for validating each of these components
- Plan for revising components based on results of the validation

5c Plan for evaluating both the components and the curriculum as a whole

see **Evaluating learning** competency category

5d Plan for maintaining curriculum

- Plan how content will be maintained
- Plan for ensuring additions to curriculum are integrated effectively
- Plan how curriculum can evolve based on needs of the business and learners
- Establish roles and responsibilities for maintaining curriculum

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

Key outputs and assessment criteria

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

Key Outputs	Assessment Criteria
Implementation plan	<ul style="list-style-type: none"> • Includes rationale for approach, resources required, budget, comprehensive list of activities and timing, with clear roles and responsibilities • Addresses needs and concerns of client and other stakeholders • Addresses transition from previous to new curriculum • Addresses providing technical and tutorial support for new curriculum • Includes proposals for announcing and promoting new curriculum • Addresses validation of components and curriculum as a whole • Plan is approved by client
Maintenance plan	<ul style="list-style-type: none"> • Addresses ongoing maintenance of content • Addresses how additions to the curriculum will be integrated effectively

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Designing learning experiences

Introduction

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

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

Competent design of learning experiences ensures:

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

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

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

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

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

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

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

Designing learning experiences

Competencies and supporting competencies

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

1 Conduct design analysis

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

2 Establish learning objectives and evaluation

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

3 Create detailed design

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

4 Develop materials

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

Competencies and supporting competencies cont'd

5 Support implementation

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

1 Conduct design analysis

Importance

The impact of mastering these competencies is you:

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

Supporting competencies and skills

These skills (with checkboxes) contribute to mastery of the supporting competencies (in bold).

1a Confirm learning will address the identified performance gap(s)

- Review needs assessment report, if available, for comprehension and completeness
- Review job, competency, or goal analysis, if available, to clarify desired performance
- Confirm performance gap(s) can be addressed through learning and related transfer activities
- Confirm priority competencies or tasks required to close performance gaps
- Confirm target audience for learning, and whether the learning is mandatory

1b Determine context requirements for learning

- Gather information about learners (such as their perspective, education, technology literacy)
- Identify design constraints (such as scheduling, location of learners, components of corporate culture, brand standards, style guidelines, cost, equipment)
- Identify accessibility requirements (such as accessibility for elearning, classroom, websites, job aids)
- Identify technical constraints (such as preferred software or authoring tools, network limitations)
- Consider how current and future availability of technology might impact the design (such as reporting and tracking capabilities, social media)
- Advise on how technology and tools can support learning experience (see [Designing curricula 2e](#))

1c Research subject matter

- Identify potential sources of subject matter expertise (such as subject matter experts (SMEs), job documentation, learning materials, books, websites, social media, research reports)
- Review existing job-related subject matter resources and learning materials
- Interview subject matter experts to gather initial information

1 Conduct design analysis

Supporting competencies and skills cont'd

1d Conduct task analysis

- Work with subject matter experts to:
 - Determine whether each task is a procedure, process, set of principles, or a combination
 - Break tasks into component parts
 - Identify relationships among tasks and sub-tasks
 - Identify all skills and knowledge required for successfully mastering the task
- Present results of task analysis in a way that is easy to understand
- Validate task analysis for accuracy and completeness

1e Plan for designing and developing learning

- Define project deliverables (such as pre-work, case handouts, job aids, participant workbook)
- Determine roles and responsibilities, time, budget, software, and other technology required to design and develop learning experience
- Develop an efficient and effective project plan for designing and developing learning experience
- Prepare a preliminary plan for validating and maintaining learning experience
- Update plans as information and requirements evolve during the design and development process

1 Conduct design analysis

Key outputs and assessment criteria

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

Key Outputs	Assessment Criteria
Desired performance outcome(s) and performance gap(s)	<ul style="list-style-type: none"> • Analysis acknowledges any assessment of performance needs already conducted • Gap between current and desired performance outcomes is clear • Gap is stated in terms of specific performance outcomes • Analysis confirms that performance gap(s) can be addressed through a learning solution and related transfer activities
Context requirements for learning	<ul style="list-style-type: none"> • Context requirements are documented, feasible, accurate • Context requirements include relevant information about the learner, design constraints and technical constraints • Impact of context requirements on design is identified
Task analysis	<ul style="list-style-type: none"> • Task analysis is documented and comprehensive • Task analysis is based on first-hand knowledge of job responsibilities • Task analysis identifies sub-tasks, skills, and knowledge required to achieve desired performance outcomes • Task analysis uses active and appropriate verbs
Plan for design and development of learning	<ul style="list-style-type: none"> • Plan includes specifications for deliverables, roles and responsibilities, costs, timing, and software and technology requirements • Plan identifies detailed review and sign-off process and responsibilities • Plan includes initial plans for pilot, translation, printing and distribution, web hosting, and maintenance • Plan is documented and communicated

1 Conduct design analysis

2 Establish learning objectives and evaluation

3 Create detailed design

4 Develop materials

5 Support implementation

2 Establish learning objectives and evaluation

Importance

The impact of mastering these competencies is you:

- ensure learning objectives are closely aligned with desired performance outcomes;
- sequence learning in a way that makes sense; and
- design evaluation of learning objectives before designing the instruction.

Supporting competencies and skills

These skills (with checkboxes) contribute to mastery of the supporting competencies (in bold).

2a Write learning objectives

- Identify appropriate level of learning for each learning objective (such as remembering, understanding, applying, analyzing, evaluating, creating)
- Write statements describing:
 - The observable outcome for each key skill or knowledge requirement
 - The conditions under which the outcome may be performed
 - The standards of acceptable performance
- Sequence learning objectives for ease of learning
- Validate learning objectives for accuracy and sequence
- Validate learning objectives for alignment with desired performance outcomes

2b Design evaluation of learning objectives

- Identify appropriate level of evaluation for each learning objective (such as recall, comprehension, application, analysis, synthesis, evaluation)
- Identify appropriate type of evaluation for each learning objective (such as test questions for comprehension, observation of practice or role play for application)
- Determine how technology can support evaluation of learning (such as online testing, performance tracking, automated reporting)
- Determine procedures for administering the evaluation

2c Develop materials to evaluate learning objectives

- Prepare assessment forms, checklists, and scoring guides to evaluate tasks and skills (such as observation of practice or role play for application, case study for analysis)
- Write test questions and scoring guides to evaluate knowledge
 - Determine the number of questions needed to evaluate each learning objective
 - Draft test questions with correct and anticipated incorrect responses
- Test online evaluations to ensure they are usable and accurately track and report data

1 Conduct design analysis

2 Establish learning objectives and evaluation

3 Create detailed design

4 Develop materials

5 Support implementation

2 Establish learning objectives and evaluation

Key outputs and assessment criteria

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

Key Outputs	Assessment Criteria
Learning objectives	<ul style="list-style-type: none"> • Learning objectives are documented and validated • Appropriate level of learning (such as recall, comprehension, application, analysis, synthesis, evaluation) is clear for each learning objective • Learning objectives include observable outcome, condition, and standard for each objective at an application, analysis, synthesis, or evaluation level • Learning objectives are sequenced for ease of learning • Learning objectives are aligned with desired performance outcomes
Design for evaluation of learning objectives	<ul style="list-style-type: none"> • Evaluation method(s) is appropriate to level of learning objectives • Evaluation method(s) ensures outcome is observable • Evaluation method(s) indicates how the evaluation is to be assessed • Evaluation method(s) identifies assessment and administration procedures (such as scoring, opportunity to re-try) • Evaluation method(s) is consistent with context requirements for learning experience
Materials to evaluate learning objectives	<ul style="list-style-type: none"> • Materials to evaluate learning are appropriate to level of learning objectives • Materials to evaluate learning enable observation of achievement of learning objectives

3 Create detailed design

Importance

The impact of mastering these competencies is you:

- select the delivery channel(s) that best support the learning objectives;
- design learning activities that engage learners and support the achievement of learning objectives;
- ensure the overall design is approved before spending time on developing materials;
- receive feedback while changes are relatively easy to make; and
- identify potential technology issues.

Supporting competencies and skills

These skills (with checkboxes) contribute to mastery of the supporting competencies (in bold).

3a **Prototype designs to get input from stakeholders**

- Watch and listen to gain the learners' perspectives
- Generate a broad range of possible solutions
- Create and get input on a series of quick prototypes
- Test to inform the next iteration of prototypes

3b **Determine delivery channel(s)**

- Identify options for delivery channel(s) (such as classroom, virtual classroom, job aid, web-based learning, videos, social learning)
- Determine criteria for assessing alternative channels (such as supports learning objectives, minimizes cost, compatible with existing network and systems)
- Ensure delivery channel(s) will meet accessibility requirements
- Select appropriate channel(s) based on criteria

3c **Create detailed outline for learning experience**

- Determine if existing learning materials can be used, in part or whole, to achieve learning objectives
- Determine a general strategy for teaching content (such as demonstration, discovery learning)
- Co-design learning experience with client, as appropriate
- Create learning activities to provide key knowledge and skill (such as demonstration, application activity)
- Estimate length of time for units and learning activities
- Negotiate additional requirements to support learning activities with learning experiences sponsor(s)
- Determine requirements for audio/visual materials
- Ensure learning experience will meet accessibility requirements

1 Conduct design analysis

2 Establish learning objectives and evaluation

3 Create detailed design

4 Develop materials

5 Support implementation

3 Create detailed design

Supporting competencies and skills cont'd

3d Design support for transfer of learning and sustained performance

- Design initiatives to support transfer of learning (such as assistance with application of skills, reminders of what was learned, spaced reinforcement, tips for improving efficiency, techniques for customizing skills to specific situations, feedback on application of new skills)
- Design for spaced reinforcement of learning at appropriate intervals
- Leverage technology to support transfer of learning (such as automated reminders, performance tracking, performance support, use of social media)
- Estimate timing and work effort to support transfer of learning
- Design, or advise on the design of, performance support systems and materials (such as repositories for videos and job aids)
- Design, or advise on the design of, social media to support transfer of learning (such as blogs, wikis, discussion forums)
- Design, or advise on design of, incentives to support transfer of learning (such as badges, leader boards, bonuses)

3e Prototype learning materials

- Incorporate design requirements (such as corporate branding, templates, guidelines)
- Produce prototypes of learning materials (such as participant workbook, facilitator guide, slides)
- Produce prototypes of workbook page types (such as content, instructions, reflection notes)
- Test technology and other logistics
- Ensure learning materials will meet accessibility requirements

3f Prototype digital interface

- Produce prototypes of interface design, including titles, menus and all navigation elements
- Produce prototypes of screen types (such as text and graphic, multiple choice, drag and drop)
- Test technology and other logistics
- Ensure interface will meet accessibility requirements

3g Conduct design walkthrough

- Conduct walkthrough of detailed outline for learning experience and prototypes with key stakeholders
- Secure sign-off on detailed outline for learning experience and prototypes
- Document design style guidelines so they can be replicated

3 Create detailed design

Key outputs and assessment criteria

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

Key Outputs	Assessment Criteria
Detailed outline for learning experience	<ul style="list-style-type: none"> • Document includes organization need, performance gaps, desired performance outcomes, delivery channel(s), learning objectives, learning strategy, and content and learning activities with estimated duration • Design ensures learning strategy and activities support achievement and evaluation of learning objectives • Design includes learning activities that will engage learners • Delivery channel(s) meet(s) criteria identified • All design choices are based on performance outcomes, learning objectives, resources available, and accepted best practices in performance and learning
Design for supporting transfer of learning	<ul style="list-style-type: none"> • Design includes realistic activities and tools to support transfer of learning to the workplace, based on the desired performance outcomes • Design includes estimated time and work effort required for learners and coaches • Design uses available technology appropriately
Prototypes of learning materials	<ul style="list-style-type: none"> • Prototypes illustrate look and feel of materials and visual aids • Prototypes comply with corporate branding, templates, and guidelines • Technology and other logistics work
Prototype of digital interface	<ul style="list-style-type: none"> • Prototype includes titles, menus, and navigation elements • Prototype provides samples and templates of expected page types • Prototype complies with corporate branding, templates, and guidelines • Production quality appropriate to budget • Technology and other logistics work
Design style guidelines	<ul style="list-style-type: none"> • Design style guidelines are documented clearly and completely • Design style guidelines address uses of terminology and copyediting • Design style guidelines provide consistent text for frequently used instructions

1 Conduct design analysis

2 Establish learning objectives and evaluation

3 Create detailed design

4 Develop materials

5 Support implementation

4 Develop materials

Importance

The impact of mastering these competencies is you:

- ensure learning materials enhance the effectiveness of the learning experience and support learning objectives;
- support consistent delivery across multiple facilitators; and
- support transfer of learning to the workplace.

Supporting competencies and skills

These skills (with checkboxes) contribute to mastery of the supporting competencies (in bold).

4a Write or compile content for learner and instructor materials

- Follow instructional writing principles and organization guidelines
- Adapt and work within existing templates
- Write job aids and other learner materials
- Write text for slides, videos and websites
- Write case studies and role plays
- Write scripts for audio and video
- Write facilitator guides

4b Develop layout and visuals for learner and instructor materials

- Develop or advise on visuals to communicate content (such as pie charts, histograms, photography or illustrations, flow charts)
- Develop layouts based on type of content (such as concept, procedure, principles)
- Follow visual design principles
- Source graphics from within or outside the organization
- Comply with corporate branding templates and style guidelines
- Comply with copyright requirements

4c Develop storyboards

- Capture all information, including text, images, interactivity and activities
- Capture all programming and production instructions
- Comply with privacy, information security and copyright requirements

4d Manage review and revision cycles with stakeholders, including SMEs

- Develop templates to facilitate SME input
- Prepare for meetings with stakeholders and SMEs
- Compile input and facilitate reviews with multiple stakeholders and SMEs
- Support the resolution of differences in information and opinions

1 Conduct design analysis

2 Establish learning objectives and evaluation

3 Create detailed design

4 Develop materials

5 Support implementation

4 Develop materials

Supporting competencies and skills cont'd

4e Produce web-based learning

- Produce (or manage production of) audio recording
- Produce (or manage production of) video
- Produce (or manage production of) elearning programs
- Produce (or manage production of) websites, apps, and other digital content or tools
- Prototype materials for input and signoff prior to full production
- Manage production in multiple languages
- Curate external materials for learning (such as videos, blogs, online courses)

4f Develop materials to support transfer of learning and sustained performance

- Develop performance support (such as job aids, automated reminders)
- Develop guidance and tracking (such as self-assessments, learning progression maps)
- Develop coaching materials for managers and other coaches to support learners (such as observation checklists, validation cases, role-plays)

4g Develop materials to evaluate learner reaction

- Determine how technology can support evaluation of learner reaction
- Develop materials to assess reaction (such as feedback forms, online surveys)

4h Develop materials to evaluate transfer of learning

- Determine how technology can support evaluation of transfer of learning
- Develop materials to assess transfer of learning (such as observation checklists)

4i Validate learning design and materials

- Determine what components of design and materials need to be validated
- Determine approach for validation (such as small group validation, full group pilot)
- Conduct validation and make agreed-upon changes
- Obtain final signoff on design and materials

4 Develop materials

Key outputs and assessment criteria

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

Key Outputs	Assessment Criteria
Learner materials	<ul style="list-style-type: none"> • Learner materials conform to plan for designing and developing learning experience • Learner materials support learning objectives • Learner materials follow graphic design and instructional writing principles • Learner materials are appropriate to the learner's work environment • Learner materials are accessible
Facilitator materials	<ul style="list-style-type: none"> • Facilitator materials conform to plan for designing and developing learning experience • Facilitator materials indicate how to support achievement of learning objectives • Facilitator materials include how to evaluate learning objectives • Facilitator materials follow graphic design and instructional writing principles • Facilitator materials support preparation and delivery of the learning experience
Storyboards	<ul style="list-style-type: none"> • Storyboards support achievement and evaluation of learning objectives • Storyboards include all content, text, images, activities, and interactivity • Storyboards include programming and production instructions
Management of revision and review cycles	<ul style="list-style-type: none"> • Review cycles are planned and realistic • SMEs and stakeholders feel respected and included • Signoff is obtained at key stages of the design and development process
Web-based Learning (such as apps, videos, elearning)	<ul style="list-style-type: none"> • Learning experience conforms to detailed outline • Learning materials follow graphic design and instructional writing principles • Learning experience and materials are accessible
Materials to support transfer of learning	<ul style="list-style-type: none"> • Materials support transfer of learning • Materials clearly identify roles and responsibilities of learner and others (such as mentors, supervisors and peers) • Materials can be used in the workplace without assistance
Materials to evaluate learner reaction	<ul style="list-style-type: none"> • Evaluation clear and easy to complete • Evaluation captures relevant data (such as confidence in applying new skills on the job, effectiveness of instructional methods and materials) • Evaluation uses technology to simplify data collection and reporting
Materials to evaluate transfer of learning	<ul style="list-style-type: none"> • Evaluation is clear and easy to complete • Evaluation captures relevant data (such as uptake of new skills, proficiency in applying new skills, and barriers to transfer of learning to the workplace) • Evaluation uses technology to simplify data collection and reporting

1 Conduct design analysis

2 Establish learning objectives and evaluation

3 Create detailed design

4 Develop materials

5 Support implementation

5 Support implementation

Importance

The impact of mastering these competencies is you:

- support internal or external marketing of the learning experience;
- help ensure materials are in place for the learning experience;
- help facilitators and administrators prepare for the learning experience;
- help facilitators and coaches prepare to support transfer of learning to the workplace; and
- establish a realistic and manageable plan for keeping the learning experience up-to-date.

Supporting competencies and skills

These skills (with checkboxes) contribute to mastery of the supporting competencies (in bold).

5a Manage publication and distribution of materials

- Monitor completion of translation, publication, distribution or uploading, and storage of all materials
- Ensure final materials meet quality requirements

5b Prepare for implementation

- Write a clear, concise course or program description for communications purposes
- Secure resources to provide production assistance for live virtual classroom sessions
- Ensure any equipment and other resources required are available and functioning
- Prepare facilitators to conduct the learning experience as designed
- Secure resources to provide and track tutoring requests and technical support, as required

5c Prepare support for transfer of learning and sustained performance

- Secure people resources to provide support transfer of learning (such as coaches, peer mentors)
- Secure technology required to support transfer of learning (such as online performance tracking tools, social media platforms)
- Prepare people resources to support activities for transfer of learning
- Follow up on transfer activities

5d Plan for maintenance

- Determine requirements for maintenance of the design and learning materials
- Determine guidelines for deciding whether to make revisions (such as number of calls for technical support, significant changes to desired performance outcomes)
- Develop plan and budget for maintenance

1 Conduct design analysis

2 Establish learning objectives and evaluation

3 Create detailed design

4 Develop materials

5 Support implementation

5 Support implementation

Key outputs and assessment criteria

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

Key Outputs	Assessment Criteria
Train-the-trainer session	<ul style="list-style-type: none"> Facilitators can explain how the design supports learning objectives, desired performance outcomes and business measures Facilitators state they are prepared to deliver learning experience
Tutoring and technical support	<ul style="list-style-type: none"> Tutoring and technical support includes plan for tracking of questions, comments and issues, and implementing changes based on feedback Tutors and technical support staff can explain their role in supporting the achievement of desired performance outcomes Tutors and technical support state they are prepared to answer anticipated questions about the content or technology
Briefing for coaches and mentors	<ul style="list-style-type: none"> Coaches and mentors can explain their role in supporting transfer of learning Coaches and mentors can explain the learner's role in supporting transfer of learning Coaches and mentors state they are prepared to support transfer of learning
Maintenance plan	<ul style="list-style-type: none"> Maintenance plan includes roles and responsibilities, timing, criteria, time, and budget requirements Maintenance plan validated with appropriate stakeholders and sponsor

Facilitating learning

Introduction

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

Competent facilitation of learning ensures:

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

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

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

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

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

Facilitating learning

Competencies and supporting competencies

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

1 Prepare to facilitate

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

2 Create learning environment

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

3 Engage learners

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

4 Foster learning

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

5 Assess learning

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

1 Prepare to facilitate

Importance

The impact of mastering these competencies is you:

- ensure the learning experience supports desired performance outcomes and business measures;
- deliver the learning experience based on a clear understanding of desired job performance;
- are prepared and knowledgeable; and
- ensure logistics are in place for facilitation.

Supporting competencies and skills

These skills (with checkboxes) contribute to mastery of the supporting competencies (in bold).

1a Prepare to deliver the content and activities based on the design

- Assess design and materials for flow, clarity, and timing
- Prepare to address specific needs of target audience and organization
- Incorporate feedback from previous deliveries to improve content and design
- Coordinate roles and responsibilities when working with co-facilitator(s)
- Develop subject matter expertise, where required to facilitate effectively
- Ensure access to additional subject matter experts, as required to support facilitation
- Rehearse challenging components of the design (such as explanations of concepts and activities)
- Prepare to use classroom media and virtual classroom technology
- Adapt classroom activities as needed for virtual classroom delivery

1b Ensure learning experience supports desired performance outcomes

- Confirm learning objectives support desired performance outcomes and business measures
- Ensure each learning objective is supported by relevant content and practice activities
- Clarify the purpose and expected outcomes of each learning activity
- Adapt learning activities to the needs of the specific learner group (such as prior learning, cultural issues)
- Incorporate relevant job-related references, anecdotes, and examples
- Confirm any changes with instructional designer to ensure integrity of the design

1c Coordinate logistics

- Advise learners, supervisors, and coaches of prerequisites and requirements for pre-work and learning
- Verify logistics (on-site or virtual) have been arranged as required (such as internet access, materials, support resources, webcast producer)
- Clarify instructions for setting up and closing classroom, labs, or virtual classroom
- Ensure learning environment (on-site or virtual) accommodates participants with disabilities
- Prepare contingency plans for potential problems (such as equipment failures, schedule delays)
- Prepare materials to orient learners to any required technology

1 Prepare to facilitate

2 Create learning environment

3 Engage learners

4 Foster learning

5 Assess learning

1 Prepare to facilitate

Key outputs and assessment criteria

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

Key Outputs	Assessment Criteria
Recommendation for modifications to learning experience design and materials	<ul style="list-style-type: none"> • Client and instructional designer are advised if learning objectives not aligned with desired performance outcomes, or if learning activities do not provide content and practice to support achievement of learning objectives • Modifications reflect feedback from prior deliveries • Modifications adapt materials and delivery for specific learner group • Modifications adapt materials and delivery for virtual classroom • Modifications confirmed with instructional designer
Administrative arrangements	<ul style="list-style-type: none"> • Appropriate facilities and resources booked and organized • Learners and supervisors notified of administrative arrangements • Instructions for setting up and closing classroom and labs documented • Learner materials prepared
Contingency plans	<ul style="list-style-type: none"> • Back-up plan is in place in the event of disruption to schedule

1 Prepare to facilitate

2 Create learning environment

3 Engage learners

4 Foster learning

5 Assess learning

2 Create learning environment

Importance

The impact of mastering these competencies is you:

- create a positive, comfortable, learner-centred environment;
- share responsibility with learners for the success of learning experience; and
- minimize the negative impact of disruptive behaviour.

Supporting competencies and skills

These skills (with checkboxes) contribute to mastery of the supporting competencies (in bold).

2a Establish physical or virtual learning environment

- Confirm all logistics prior to start of facilitation (such as technology and software working as expected, materials and refreshments delivered, accessibility requirements)
- Ensure learning environment will promote learning (such as line of sight, visual aids, space is free of distractions)
- Adjust environment to accommodate needs of the learners (such as temperature, layout, access)
- Launch virtual classroom and confirm operation of functions needed

2b Address social and emotional needs of learners

- Welcome learners as they enter the physical or virtual learning environment
- Encourage introductions among learners
- Orient learners to the classroom or virtual classroom
- Provide opportunity for learners to practise using virtual classroom technology
- Monitor energy or “willingness to learn” level and adapt facilitation as needed
- Acknowledge each learner, both verbally and non-verbally

2c Establish responsibilities for the success of learning experience

- Relate learning objectives to desired performance outcomes and business results
- Clarify expectations, roles and responsibilities for learners and facilitator(s)
- Establish ground rules for individual and group behaviour
- Provide options for adjusting sequence, activities, and content as appropriate

2d Model appropriate behaviour

- Maintain warm and respectful behaviour (such as open, positive body language, smile)
- Dress to comply with dress code or unwritten norms about dress
- Use language, references, and comments appropriate to the organization and learners
- Maintain confidentiality and privacy
- Address illegal, immoral, or unethical behaviours by learners

1 Prepare to facilitate

2 Create learning environment

3 Engage learners

4 Foster learning

5 Assess learning

2 Create learning environment

Supporting competencies and skills cont'd

2e Manage disruptive or counterproductive behaviour

- Respond appropriately when participant behaviour is likely to interfere with learning
- Manage personal biases around control or personal preferences
- Encourage other learners to participate in managing disruptive or counterproductive behaviour
- Demonstrate respect for each individual when responding to disruptive behaviour

Key outputs and assessment criteria

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

Key Outputs	Assessment Criteria
Learning environment (classroom or virtual)	<ul style="list-style-type: none"> • Arranged to specifications in facilitator materials • Available prior to start of facilitation • Virtual classroom operates as expected with all materials pre-loaded
Formal welcome to learning	<ul style="list-style-type: none"> • Welcome is appropriate to learners and content of learning experience • Welcome encourages learner interaction • Learning objectives presented and clarified • Welcome clearly identifies responsibilities for learning • Ground rules established and agreed to by the group • Welcome includes administrative information
Management of disruptive or counterproductive behaviour	<ul style="list-style-type: none"> • Response is fair and respectful • Response is appropriate and timely • Response is effective in reducing or eliminating disruptive or counter-productive behaviour

1 Prepare to facilitate

2 Create learning environment

3 Engage learners

4 Foster learning

5 Assess learning

3 Engage learners

Importance

The impact of mastering these competencies is you:

- gain and keep learner interest and motivation;
- demonstrate that you value learners' knowledge and experience; and
- use technology to enhance the learning experience.

Supporting competencies and skills

These skills (with checkboxes) contribute to mastery of the supporting competencies (in bold).

3a Deliver content and instructions

- Use a variety of instructional techniques to provide content (such as demonstration, group discussion)
- Maintain appropriate balance between providing content and allowing learners to practise
- Use appropriate language, anecdotes, and examples to facilitate learning
- Minimize use of jargon
- Maintain an appropriate level of energy and enthusiasm
- Pace learning to meet the needs of the group
- Use bridges and transitions to orient learners and maintain continuity among concepts and sections
- Confirm instructions for activities are understood by learners
- Provide summaries and opportunities to review at appropriate intervals

3b Lead group discussions

- Ask questions to facilitate discussions and check understanding
- Draw upon learner experience, knowledge, and skill to enhance learning
- Use gestures, body movements, and pauses to encourage participation
- Use silence effectively to encourage learners to reflect and respond
- Encourage participation from all learners
- Ensure individual learners do not dominate discussions
- Respond to verbal and non-verbal cues from learners

1 Prepare to facilitate

2 Create learning environment

3 Engage learners

4 Foster learning

5 Assess learning

3 Engage learners

Supporting competencies and skills cont'd

3c Respond to learner questions and comments

- Encourage questions and comments from learners
- Paraphrase learner questions and comments to ensure clarity and understanding before responding
- Determine when to answer yourself, when to involve the group and when to defer a question
- Verify the question was answered or addressed before moving on
- Acknowledge learner contributions by providing both evaluative and non-evaluative feedback
- Adapt content or delivery in response to learner questions and comments
- Refer back to learner questions and comments, as appropriate

3d Use differences and controversy to enhance learning

- Encourage differing points of view
- Assist learners in understanding and reconciling differing points of view
- Model conflict resolution techniques
- Maintain composure and respect for individuals and the group

3e Optimize use of visual aids and equipment

- Position self, equipment and visual aids to enhance learning and reduce distraction
- Use media to enhance learning, not as a crutch
- Troubleshoot equipment and implement back-up plan as needed

3f Use virtual classroom tools

- Maintain technical skills required to use virtual classroom tools (such as chat, whiteboards, breakouts)
- Optimize use of virtual classroom tools to solicit input, enhance learning, and encourage collaboration
- Troubleshoot technical problems and implement back up plan as needed

1 Prepare to facilitate

2 Create learning environment

3 Engage learners

4 Foster learning

5 Assess learning

3 Engage learners

Key outputs and assessment criteria

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

Key Outputs	Assessment Criteria
Delivery of content	<ul style="list-style-type: none"> • Content delivered as designed, using appropriate methods and activities • Delivery of content does not reduce time designed for practice • Language, including examples, is clear and appropriate for learners • Bridges and transitions are clear and link sections appropriately • Non-verbal communication supports learner interaction
Group discussions	<ul style="list-style-type: none"> • Discussions engage learners through asking open questions • Discussions draw on learners' experience to reinforce learning • Discussions encourage participation from all learners
Learner questions and comments	<ul style="list-style-type: none"> • Questions encouraged to enhance learning of individuals and the group • Questions acknowledged and paraphrased to ensure understanding • Questions answered or deferred, as appropriate • Facilitator verifies that response addresses the learner's question
Differences and controversy	<ul style="list-style-type: none"> • Differences encouraged to enhance learning of individuals and the group • Differences handled with composure and respect for individuals and the group
Visual aids, equipment and online tools	<ul style="list-style-type: none"> • Visual aids, equipment, and tools used effectively to support achievement of learning objectives, and in accordance with design and operating instructions

1 Prepare to facilitate

2 Create learning environment

3 Engage learners

4 Foster learning

5 Assess learning

4 Foster learning

Importance

The impact of mastering these competencies is you:

- establish and retain credibility with learners;
- support learners in meeting the learning objectives;
- help learners interact and support one another; and
- support transfer of learning to the workplace.

Supporting competencies and skills

These skills (with checkboxes) contribute to mastery of the supporting competencies (in bold).

4a **Demonstrate appropriate expertise**

- Establish credibility by providing your credentials, including related experience
- Demonstrate understanding of the organization and relevant job performance
- Present information and concepts clearly
- Use relevant facts, examples or analogies to respond to questions or illustrate concepts
- Partner with subject matter experts
- Refer learners to resources for content beyond the scope of learning experience

4b **Facilitate individual and group activities**

- Provide opportunities for learners to practice new skills
- Set clear expectations for outcomes of activities and link to learning objectives
- Monitor progress, providing clarification and coaching as needed
- Create a supportive environment for learners to provide feedback to each other
- Provide opportunities to present and share individual and group work
- Debrief activities to reinforce learning

4c **Facilitate to support transfer of learning and sustained performance**

- Provide job- and organization-related examples while facilitating
- Link learning content and activities to job and organization requirements
- Provide opportunities to use job aids and other relevant transfer materials while facilitating
- Position transfer activities and their importance while facilitating
- Follow up on transfer activities (such as action plans, peer coaching), as appropriate

1 Prepare to facilitate

2 Create learning environment

3 Engage learners

4 Foster learning

5 Assess learning

4 Foster learning

Key outputs and assessment criteria

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

Key Outputs	Assessment Criteria
Facilitator credibility	<ul style="list-style-type: none"> Facilitator demonstrates understanding of content, organization and learners' roles Learners acknowledge facilitator's qualifications and credibility
Activities and practice	<ul style="list-style-type: none"> Instructions for activities and practice are clearly presented Activities and practice linked to learning objectives Activities and practice debriefed to reinforce learning
Positioning of transfer activities	<ul style="list-style-type: none"> Learning content, examples and activities linked to job and organization requirements Importance of transfer activities positioned while facilitating Job aids and other relevant resources incorporated into learning

1 Prepare to facilitate

2 Create learning environment

3 Engage learners

4 Foster learning

5 Assess learning

5 Assess learning

Importance

The impact of mastering these competencies is you:

- support learners in their efforts to achieve the learning objectives; and
- provide feedback and coaching to help learners improve performance.

Supporting competencies and skills

These skills (with checkboxes) contribute to mastery of the supporting competencies (in bold).

5a Confirm learners have prerequisite skills and knowledge

- Assess whether learners have prerequisite skills and knowledge (such as administering pre-tests, checking HR records, completion of prerequisites)
- Address gaps in prerequisite skills and knowledge (such as ask learners to re-enrol when ready, provide learners with additional resources, refer learners to additional learning)

5b Assess individual achievement of learning objectives

- Conduct formal or informal assessments as designed to assess performance on each learning objective (such as test questions for comprehension, observation of practice or role play for application)
- Evaluate achievement of each learning objective before moving on to the next
- Provide post-assessment feedback and coaching
- Provide additional opportunities for learning and practice, as required

Key outputs and assessment criteria

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

Key Outputs	Assessment Criteria
Qualified class list	<ul style="list-style-type: none"> • Individual learners meet entry criteria for learning • Individual learners have completed prerequisite learning
Assessment of individual learner performance	<ul style="list-style-type: none"> • Individual learner performance assessed against each learning objective • Individual learner performance assessed as designed
Feedback and coaching on performance provided to learners	<ul style="list-style-type: none"> • Specific, balanced, constructive, confidential, and respectful • Related to learning objectives • Provides corrective action where required

1 Prepare to facilitate

2 Create learning environment

3 Engage learners

4 Foster learning

5 Assess learning

Supporting transfer of learning

Introduction

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

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

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

Competent support for transfer of learning ensures:

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

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

Supporting transfer of learning

Competencies and supporting competencies

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

1 Design for transfer of learning

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

2 Implement support for transfer of learning

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

1 Design for transfer of learning

Importance

The impact of mastering these competencies is you:

- design transfer activities that are appropriate for the organization, work unit, and desired performance outcomes.

Supporting competencies and skills

These skills (with checkboxes) contribute to mastery of the supporting competencies (in bold).

1a Plan to support transfer of learning and sustained performance

completed in *Assessing performance needs 4c*

- Assess environment to determine feasible options for supporting transfer of learning
- Recommend initiatives to support transfer (such as communication of expectations, reminders, feedback mechanisms, follow-up activities, coaching/mentoring support, incentives)
- Determine resources required to support transfer of learning
- Determine how technology can support transfer of learning (such as automated reminders, online performance tracking, links to support)

1b Design support for transfer of learning and sustained performance

completed in *Designing learning experiences 3d*

- Design initiatives to support transfer of learning (such as assistance with application of skills, reminders of what was learned, tips for improving efficiency, techniques for customizing skills to specific situations, feedback on application of new skills)
- Design for spaced reinforcement of learning at appropriate intervals
- Leverage technology to support transfer of learning (such as automated reminders, performance tracking, performance support, use of social media)
- Estimate timing and work effort to support transfer of learning
- Design, or advise on the design of, performance support systems and materials (such as repositories for videos and job aids)
- Design, or advise on the design of, social media to support transfer of learning (such as blogs, wikis, discussion forums)
- Design, or advise on design of, incentives to support transfer of learning (such as badges, leader boards, bonuses)

1c Develop materials to support transfer of learning and sustained performance

completed in *Designing learning experiences 4f*

- Develop performance support (such as job aids, automated reminders)
- Develop guidance and tracking materials (such as self-assessments and learning progression maps)
- Develop coaching materials to help managers and other coaches to support learners (such as observation checklists, validation cases, role-plays)

1 Design for transfer of learning

Key outputs and assessment criteria

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

Key Outputs	Assessment Criteria
Plan for supporting transfer of learning	<ul style="list-style-type: none"> • Plan includes realistic solutions for transfer of learning, based on desired performance outcomes • Plan identifies resources and time required to implement support for transfer of learning • Plan includes communication and follow-up activities • Plan identifies technology to support transfer of learning
Design for supporting transfer of learning	<ul style="list-style-type: none"> • Design includes realistic activities and tools to support transfer of learning, based on the desired performance outcomes • Design includes estimated time and work effort required for learners and coaches • Design uses available technology appropriately
Materials to support transfer of learning	<ul style="list-style-type: none"> • Materials support transfer of learning • Materials clearly identify roles and responsibilities of learner and others (such as mentors, supervisors, peers) • Materials can be used in the workplace without assistance

2 Implement support for transfer of learning

Importance

The impact of mastering these competencies is you:

- increase the likelihood learners will transfer learning to the workplace.

Supporting competencies and skills

These skills (with checkboxes) contribute to mastery of the supporting competencies (in bold).

2a Prepare support for transfer of learning and sustained performance

completed in **Designing learning experiences 5c**

- Secure people resources to provide support for transfer of learning (such as coaches, peer mentors)
- Secure technology required to support transfer of learning (such as online performance tracking tools, social media platforms)
- Prepare people to support activities for transfer of learning
- Follow up on transfer activities, as appropriate

2b Facilitate to support transfer of learning and sustained performance

completed in **Facilitating learning 4c**

- Provide job- and organization-related examples while facilitating
- Link learning content and activities to job and organization requirements
- Provide opportunities to use job aids and other relevant transfer materials while facilitating
- Position transfer activities and their importance while facilitating
- Follow up on transfer activities (such as action plans, peer coaching), as appropriate

Key outputs and assessment criteria

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

Key Outputs	Assessment Criteria
Briefing for coaches and mentors	<ul style="list-style-type: none"> • Coaches and mentors can explain their role in supporting transfer of learning • Coaches and mentors can explain the learner's role in supporting transfer of learning • Coaches and mentors state they are prepared to support transfer of learning
Positioning of transfer activities	<ul style="list-style-type: none"> • Learning content, examples, and activities linked to job and organization requirements • Importance of transfer activities positioned while facilitating • Job aids and other relevant resources incorporated into learning

Evaluating learning

Introduction

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

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

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

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

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

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

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

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

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

Evaluating learning

Competencies and supporting competencies

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

1 Evaluate learner reaction

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

2 Evaluate learning objectives

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

3 Evaluate transfer of learning

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

4 Evaluate business results

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

1 Evaluate learner reaction

Importance

The impact of mastering these competencies is you:

- identify opportunities for improving the facilitation and design of the learning experience.

Supporting competencies and skills

These skills (with checkboxes) contribute to mastery of the supporting competencies (in bold).

1a Develop materials to evaluate learner reaction

completed in *Designing learning experiences 4g*

- Determine how technology can support evaluation of learner reaction
- Develop materials to assess reaction (such as feedback forms, online surveys)

1b Assess learner reaction

- Gather data to assess aggregate learner reaction
- Identify patterns and trends in learner reaction
- Identify factors other than learning that might impact learner reaction

1c Recommend changes based on learner reaction

- Identify potential changes to design and facilitation based on assessment of learner reaction
- Determine feasibility of identified changes
- Recommend changes to improve design and facilitation

Key outputs and assessment criteria

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

Key Outputs	Assessment Criteria
Materials to evaluate learner reaction	<ul style="list-style-type: none"> • Evaluation is clear and easy to complete • Evaluation captures relevant data (such as confidence in applying new skills on the job, effectiveness of instructional methods and materials) • Evaluation uses technology to simplify data collection and reporting
Assessment of aggregate learner reaction	<ul style="list-style-type: none"> • Results identify patterns and trends in learner reaction • Results identify factors that impact learner reaction
Recommended changes to design and facilitation	<ul style="list-style-type: none"> • Recommendations based on valid and reliable data • Recommended changes support achievement of learning objectives

1 Evaluate learner reaction

2 Evaluate learning objectives

3 Evaluate transfer of learning

4 Evaluate business results

2 Evaluate learning objectives

Importance

The impact of mastering these competencies is you:

- determine whether learners have achieved the learning objectives, individually and collectively;
- can provide certification of learning, where required; and
- identify opportunities for improving the design and facilitation of the learning experience.

Supporting competencies and skills

These skills (with checkboxes) contribute to mastery of the supporting competencies (in bold).

2a Write learning objectives

completed in *Designing learning experiences 2a*

- Identify appropriate level of learning for each learning objective (such as remember, understand, apply, analyse, evaluate, create)
- Write statements describing:
 - The observable outcome for each key skill or knowledge requirement
 - The conditions under which the outcome may be performed
 - The standards of acceptable performance
- Sequence learning objectives for ease of learning
- Validate learning objectives for accuracy and sequence
- Validate learning objectives for alignment with desired performance outcomes

2b Design evaluation of learning objectives

completed in *Designing learning experiences 2b*

- Identify appropriate level of evaluation for each learning objective (such as remember, understand, apply, analyse, evaluate, create)
- Identify appropriate type of evaluation for each learning objective (such as test questions for comprehension, observation of practice or role play for application)
- Determine how technology can support evaluation of learning (such as online testing, performance tracking, automated reporting)
- Determine procedures for administering the evaluation

2c Develop materials to evaluate learning objectives

completed in *Designing learning experiences 2c*

- Prepare assessment forms, checklists, and scoring guides to evaluate tasks and skills (such as observation of practice or role play for application, case study for analysis)
- Write test questions and scoring guides to evaluate knowledge
 - Determine the number of questions needed to evaluate each learning objective
 - Draft test questions with correct and anticipated incorrect responses
- Test online evaluations to ensure they are usable and accurately track and report data

1 Evaluate learner reaction

2 Evaluate learning objectives

3 Evaluate transfer of learning

4 Evaluate business results

2 Evaluate learning objectives

Supporting competencies and skills cont'd

2d Assess individual achievement of learning objectives

completed in *Facilitating learning 5b*

- Conduct formal or informal assessments as designed to assess performance on each learning objective (such as test questions for comprehension, observation of practice or role play for application)
- Evaluate achievement of each learning objective before moving on to the next
- Provide post-assessment feedback and coaching
- Provide additional opportunities for practice, as required

2e Assess aggregate achievement of learning objectives

- Compile data on individual achievement of learning objectives
- Analyze aggregate data on achievement of learning objectives
- Identify patterns and trends in achievement of learning objectives
- Identify factors that impact achievement of learning objectives

2f Recommend changes based on evaluation of learning objectives

- Identify potential changes to design and facilitation based on evaluation of learning objectives
- Determine feasibility of identified changes
- Recommend changes to improve design and facilitation
- Plan for implementing changes, and providing updates and refreshers to learners

1 Evaluate learner reaction

2 Evaluate learning objectives

3 Evaluate transfer of learning

4 Evaluate business results

2 Evaluate learning objectives

Key outputs and assessment criteria

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

Key Outputs	Assessment Criteria
Learning objectives	<ul style="list-style-type: none"> • Learning objectives documented and validated • Appropriate level of learning (such as remember, understand, apply, analyse, evaluate, create) is clear for each learning objective • Learning objectives include observable outcome, condition, and standard for each objective at an applying, analysing, evaluating, or creating level • Learning objectives sequenced for ease of learning • Learning objectives aligned with desired performance outcomes
Design for evaluation of learning objectives	<ul style="list-style-type: none"> • Design of evaluation appropriate to level of learning objectives • Design of evaluation ensures outcome is observable • Design of evaluation indicates how the evaluation is to be assessed • Design of evaluation identifies assessment and administration procedures (such as scoring, opportunity to re-try) • Design of evaluation consistent with context requirements for learning
Materials to evaluate learning objectives	<ul style="list-style-type: none"> • Materials to evaluate learning are appropriate to level of learning objectives • Materials to evaluate learning enable observation of achievement of learning objectives
Assessment of individual learner performance	<ul style="list-style-type: none"> • Individual learner performance assessed against each learning objective • Individual learner performance assessed as designed
Assessment of aggregate learner performance	<ul style="list-style-type: none"> • Patterns and trends identified in achievement of learning objectives • Factors identified that impact achievement of learning objectives
Recommended changes to design and facilitation	<ul style="list-style-type: none"> • Recommendations based on assessment of aggregate data about learner performance • Recommended changes support achievement of learning objectives

1 Evaluate learner reaction

2 Evaluate learning objectives

3 Evaluate transfer of learning

4 Evaluate business results

3 Evaluate transfer of learning

Importance

The impact of mastering these competencies is you:

- determine whether the learning solution impacts performance outcomes; and
- identify opportunities for improving transfer of learning to the workplace.

Supporting competencies and skills

These skills (with checkboxes) contribute to mastery of the supporting competencies (in bold).

3a Plan to evaluate transfer of learning

completed in **Assessing performance needs 4d**

- Identify pre-intervention (benchmark) performance
- Recommend how post-intervention performance should be assessed against benchmark data
- Determine timing for evaluation and resources required

3b Identify desired performance outcomes

completed in **Assessing performance needs 2d**

- Write statements describing:
 - The observable outcome desired
 - The conditions under which the outcome may be achieved
 - The business measures that will indicate whether the outcome has been achieved
- Validate desired performance outcomes

3c Develop materials to evaluate transfer of learning

completed in **Designing learning experiences 4h**

- Determine how technology can support evaluation of transfer of learning
- Develop materials to assess transfer of learning (such as observation checklists)

3d Assess transfer of learning to the workplace

- Gather data to identify gaps between pre-learning, current, and desired performance outcomes
- Identify factors other than the learning that might impact performance outcomes
- Assess impact of learning on performance outcomes
- Determine barriers to transfer of learning (such as software not working as expected, supervisors not supporting performance)

1 Evaluate learner reaction

2 Evaluate learning objectives

3 Evaluate transfer of learning

4 Evaluate business results

3 Evaluate transfer of learning

Supporting competencies and skills cont'd

3e Recommend changes based on evaluation of transfer of learning

- Identify potential changes to the design and facilitation based on how learning solution has impacted performance outcomes
- Identify potential changes to support transfer of learning based on how learning solution has impacted performance outcomes
- Determine feasibility of identified changes
- Recommend changes to improve impact of learning solution on performance outcomes

Key outputs and assessment criteria

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

Key Outputs	Assessment Criteria
Plan to evaluate transfer of learning	<ul style="list-style-type: none"> • Plan identifies what data will be gathered and analyzed • Plan identifies when evaluation will be conducted • Plan includes benchmarks of pre-intervention performance • Plan includes estimate of resources required to implement evaluation plan
Materials to evaluate transfer of learning	<ul style="list-style-type: none"> • Evaluation is clear and easy to complete • Evaluation captures relevant data (such as uptake of new skills, proficiency in applying new skills, and barriers to transfer of learning to the workplace) • Evaluation uses technology to simplify data collection and reporting
Assessment of performance results	<ul style="list-style-type: none"> • Gap between pre-intervention, current and desired performance outcomes identified • Results stated in terms of specific performance outputs • Results based on accurate and reliable data and sound analysis • Cause-effect relationships determined among performance gaps • Assessment determines appropriateness of desired performance outcomes in light of actual performance data
Recommended changes to learning solutions	<ul style="list-style-type: none"> • Recommendations based on analysis of how the learning has impacted performance • Recommendations continue to support achievement of learning objectives • Recommendations are realistic for organization and work unit
Recommended changes to support for transfer of learning	<ul style="list-style-type: none"> • Recommendations based on identified barriers to transfer of learning • Recommendations continue to support achievement of learning objectives • Recommendations realistic for organization and work unit

1 Evaluate learner reaction

2 Evaluate learning objectives

3 Evaluate transfer of learning

4 Evaluate business results

4 Evaluate business results

Importance

The impact of mastering these competencies is you:

- determine whether the learning solution impacts business results; and
- identify opportunities for improving the learning and other performance solutions.

Supporting competencies and skills

These skills (with checkboxes) contribute to mastery of the supporting competencies (in bold).

4a Plan to evaluate business results for leaning solutions

completed in **Assessing performance needs 4d**

- Identify pre-intervention (benchmark) business measures
- Recommend how post-intervention business results should be assessed against benchmark data
- Determine timing for evaluation and resources required

4b Identify business measures

completed in **Assessing performance needs 2d**

- Write statements describing:
 - The observable outcome desired
 - The conditions under which the outcome may be achieved
 - The business measures that will indicate whether the outcome has been achieved
 - The targeted level of that business measure
- Validate business measures

4c Assess business results

- Gather data to identify gaps between pre-intervention, current, and desired performance outcomes
- Identify factors other than performance outcomes that might impact business results
- Assess impact of learning on performance outcomes and subsequent business results

4d Recommend changes based on evaluation of business results

- Identify potential changes to the design and facilitation based on how learning solution and performance outcomes have impacted business results
- Identify potential changes to support for transfer of learning based on how learning solution and performance outcomes have impacted business results
- Determine feasibility of identified changes
- Recommend changes to improve impact of learning solution on performance outcomes and subsequent business results

1 Evaluate learner reaction

2 Evaluate learning objectives

3 Evaluate transfer of learning

4 Evaluate business results

4 Evaluate business results

Key outputs and assessment criteria

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

Key Outputs	Assessment Criteria
Plan to evaluate business results	<ul style="list-style-type: none"> • Plan identifies what data will be gathered and analyzed • Plan identifies when evaluation will be conducted • Plan includes benchmarks of pre-intervention business results • Plan includes estimate of resources required to implement evaluation plan
Assessment of business results	<ul style="list-style-type: none"> • Gap between pre-intervention, current, and desired business results identified • Results stated in terms of specific business measures • Results based on accurate and reliable data and sound analysis • Cause-effect relationships determined among intervention, performance outcomes, and business results • Assessment determines appropriateness of business measures in light of actual business results
Recommended changes to learning solution (including support for transfer)	<ul style="list-style-type: none"> • Recommendations based on analysis of how learning solution has impacted performance outcomes and subsequent business results • Recommended changes support achievement of desired performance outcomes • Recommendations are realistic for organization and work unit

1 Evaluate learner reaction

2 Evaluate learning objectives

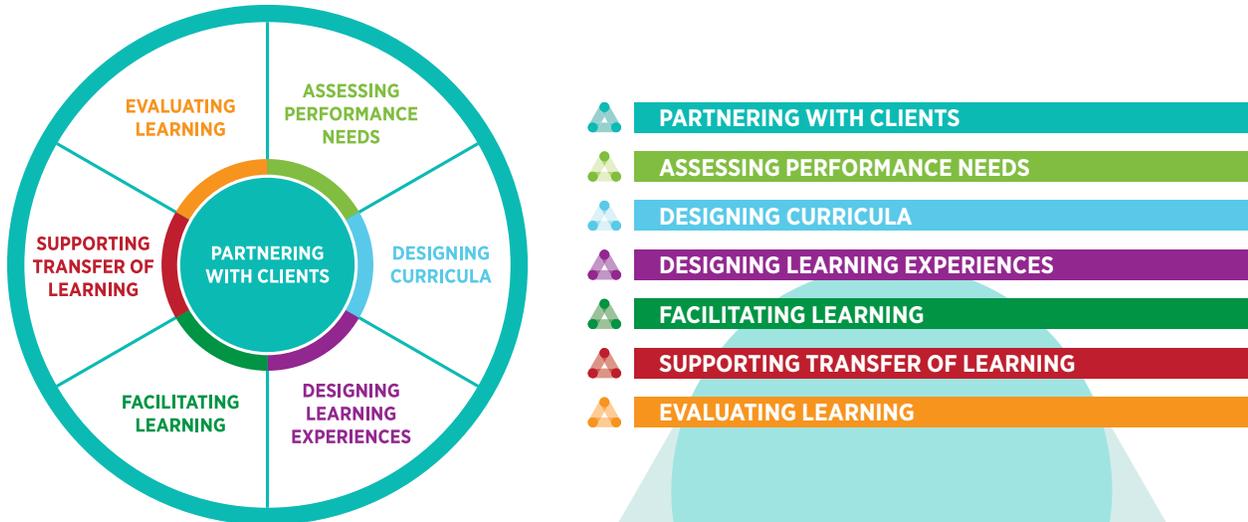
3 Evaluate transfer of learning

4 Evaluate business results

Competencies for Performance and Learning Professionals

Competencies for Performance and Learning Professionals is the desktop reference every performance and learning professional needs – it is both a guide to your personal professional development and the framework for the design and development of curricula and courses. *Competencies for Performance and Learning Professionals* provides a summary of the knowledge you need to succeed in the learning profession. Discover a clear picture of competence performance and how you can achieve it with this indispensable tool.

Competencies for Performance and Learning Professionals identifies the core competencies for the profession, organized into the following 7 categories:



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

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