Competencies of CLE Professionals

Submitted by Curriculum/Content Special Committee

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<u>Introduction</u>

In January, 2013, the ACLEA Executive Committee appointed a committee to identify and organize into a logical fashion, core competencies specific to the CLE profession. To accomplish this task, committee members discussed and researched CLE operational issues and trends, conducted focus groups which included both ACLEA member and nonmember CLE professionals, created a survey instrument and surveyed the full ACLEA membership, and conducted individual staff interviews with more than 30 full-time CLE employees in a variety of CLE settings. The committee also reviewed core competencies that have been identified in related areas and disciplines.

The committee examined the field of CLE from both a broad and a narrow perspective, focusing on the specific knowledge, skills and abilities needed to successfully perform a wide variety of CLE jobs. The set of core competencies which the committee identified will assist ACLEA in planning annual conferences and will be valuable to both managers and other staff involved in CLE design.

The committee identified the following core competency areas.

CORE COMPETENCY AREAS

1. Leadership
2. Financial Management
3. Human Resource Management
4. Project/Process Management
5. Knowledge Management
6. Relationship Management
7. Risk Management
8. Communications
9. Law and Legal Context
10. Adult Education
11. Meeting and Event Planning
12. Editing and Publishing
13. Marketing
14. Technology
15. Ethics and Professionalism

CLE professionals tend to have varied roles and responsibilities. Many of the core competencies required by CLE professionals can be found across these 15 competency domains.

1. LEADERSHIP

Effective leadership requires the ability to work with policy makers, faculty members, staff and learners to develop a vision and a plan which produces effective educational experiences. Leaders in CLE must be able to convince these stakeholders of the value of the CLE enterprise and must be able to articulate and carry out the organization's mission.

The following competencies are relevant to CLE professionals engaged in leadership roles:

- Knowledge of leadership and management models
- Knowledge of governance best practices
- Knowledge of the organization and context
- Skill in strategic planning
- Skill in solving problems and making decisions
- Skill in delegation
- Skill in generating enthusiasm among staff and stakeholders
- Ability to set vision and strategy
- Ability to manage politics and influence others
- Ability to effectively manage change

2. FINANCIAL MANAGEMENT

CLE professionals who have responsibility to manage the finances of the organization, or to manage revenue or expenses related to specific projects, must have relevant financial management competencies. These competencies include:

- Knowledge of financial statements
- Knowledge of basic accounting principles
- Knowledge of financial reporting
- Knowledge of financial controls and procedures
- Skill in identifying, accessing, and interpreting data for budget preparation (e.g. previous budgets, market trends)
- Skill in identifying sources of revenue/funding
- Skill in allocating budget expenses
- Skill in analyzing financial performance
- Ability to establish pricing
- Ability to develop a budget
- Ability to monitor budget performance

3. HUMAN RESOURCE MANAGEMENT

CLE professionals engaged in human resource management activities (i.e. employees, contractors, volunteers) must be able to actively and effectively manage a CLE organization's talent. Related competencies include:

- Knowledge of legislation and case law relevant to human resource functions
- Knowledge of accepted human resource policies, procedures, and practices
- Knowledge of organizational design theory and practice
- Skill in human resource planning (including identifying human resource needs)
- Skill in developing and implementing strategies for worker engagement
- Skill in handling disagreements and conflicts (including dealing effectively with terminations)
- Ability to effectively recruit, select, and onboard new employees, contractors, and volunteers

- Ability to establish a compensation/recognition framework that meets organizational objectives
- Ability to assist individuals in identifying development paths and learning plans/activities for personal and organizational success
- Ability to develop learning/training initiatives to address current and future competency gaps
- Ability to implement systems to enhance current and future individual and team performance

4. PROJECT/PROCESS MANAGEMENT

CLE professionals who are responsible for managing projects or processes require certain project and/or process management competencies. These competencies include:

- Knowledge of project management best practices
- Skill in specifying actions, time frames, and performance measurements to achieve goals and objectives
- Skill in identifying required resources
- Skill in developing quality standards, policies, and procedures
- Ability to develop a project plan/charter
- Ability to meet deadlines and to manage work on several projects simultaneously
- Ability to develop a procurement plan (to acquire needed goods or services)
- Ability to identify milestones/establish a critical path
- Ability to manage a critical path
- Ability to develop evaluation and/or audit procedures

5. KNOWLEDGE MANAGEMENT

CLE professionals who work with data, information, or knowledge require the ability to manage these resources effectively. Relevant competencies include:

- Knowledge of the importance of knowledge management
- Knowledge of data, information, and knowledge resources
- Skill in finding relevant data, information, and knowledge
- Skill in evaluating data, information, and knowledge
- Skill in keeping data, information, and knowledge current
- Ability to use processes and systems to manage data, information, and knowledge
- Ability to analyze and assess data, information, and knowledge
- Ability to use data, information, and knowledge for decision-making
- Ability to expand knowledge through networking and learning from others

6. RELATIONSHIP MANAGEMENT

CLE professionals who work directly with stakeholders must be able to effectively manage relationships. Relevant competencies include:

- Knowledge of key stakeholders
- Skill in identifying relevant stakeholders, their needs and perspectives
- Skill in building and maintaining relationships
- Ability to manage multiple stakeholder relationships
- Ability to evaluate success of relationship engagement efforts

7. RISK MANAGEMENT

CLE professionals engaged various roles are expected to manage risk. Risk management competencies may include:

- Knowledge of common risk factors and types of risk
- Knowledge of the importance of risk management
- Skill in identifying scope and nature of legal, ethical, regulatory, political, and financial risk
- Skill in analyzing risks based on frequency and criticality
- Ability to develop and document contingency and mitigation plans
- Ability to implement contingency and mitigation plans

8. COMMUNICATIONS

CLE professionals must:

- Knowledge of English usage (including grammar, diction, style, punctuation, organization, and idea development and presentation)
- Knowledge of effective communications and communications planning
- Skill in communicating effectively in writing
- Skill in communicating effectively orally
- Ability to develop an integrated communications plan

9. LAW AND LEGAL CONTEXT

CLE professionals must have a general understanding of the context in which CLE services are provided. Related competencies include:

- Knowledge of lawyers, law firms, and legal services
- Knowledge of legal terminology
- Knowledge of the regulatory scheme (e.g. MCLE rules)
- Knowledge of issues and trends in various practice areas

10. ADULT EDUCATION

CLE professionals engaged in education activities must be competent in adult education domains including:

- Knowledge of how adults learn (adult education best practices)
- Knowledge of needs assessment
- Knowledge of instructional design best practices
- Knowledge of instructional delivery methods
- Knowledge of evaluation techniques
- Skill in facilitating planning committee meetings
- Skill in providing feedback to learners
- Skill in assessing learner aptitude (level and expertise and skill) and needs
- Ability to assess educational and professional development needs
- Ability to translate needs assessment into instructional goals and learning outcomes
- Ability to develop curriculum or resource plan to meet instructional goals and learning outcomes
- Ability to identify delivery format/methods appropriate to the audience and content
- Ability to structure and sequence program components effectively

- Ability to recruit and support subject matter experts appropriate to the learning outcomes and delivery method (faculty development)
- Ability to evaluate effectiveness of educational initiative in achieving its intended goals
- Ability to analyze evaluations to incorporate into future planning
- Ability to assess what learners have learned

11. MEETING AND EVENT PLANNING

CLE professionals who are responsible for planning meetings or events require certain competencies. These competencies include:

- Knowledge of meeting and event planning best practices
- Skill in selecting an appropriate site (site specifications, inspections)
- Skill in managing technical production (staging and equipment requirements, acquisitions, installations, oversight of production operation)
- Ability to coordinate food and beverage services (f&b requirements, select menus, plan service style, select providers)
- Ability to design meeting or event environment (functional requirements, select décor, coordinate signage)
- Ability to develop plan for managing movement of attendees (admittance systems, crowd management, coordinating accommodation and transportation, protocol requirements)
- Ability to design site layout
- Ability to manage meeting or event site (logistics plan for set-up and take-down, site set up, monitor site, dismantle site)
- Ability to manage on-site communications (establish communications framework, equipment and resources, procedures and protocols)

12. EDITING AND PUBLISHING

CLE professionals engaged in publications require editing and/or publishing competencies. Such competencies include:

- Knowledge of established references manuals and guidelines
- Knowledge of editing, publishing, and distribution methods, standards, and practices
- Knowledge of basic copyright law
- Skill in applying rules of English usage to correct grammatical and writing errors
- Skill in determining what document type is most suited to the content and audience
- Skill in organizing material, including determining weight and position in a document, document structure, and use of appropriate navigational aids
- Ability to apply editing and text-publishing methods, standards, and practices in preparing documents for publication
- Ability to synthesize, organize, rewrite, refine, format, edit materials while maintaining the integrity of the ideas
- Ability to ensure consistency of style and information within a document
- Ability to explain and defend editorial decisions
- Ability to work with visual information specialists to ensure correctness, consistency, and completeness of final graphics and layout
- Ability to aid in maintaining up-to-date writing/editing standards and guidelines

13. MARKETING

CLE professionals engaged in marketing or communications activities require competencies in these disciplines. These competencies may include:

- Knowledge of marketing basics
- Knowledge of target market
- Skill in writing copy, including program or product descriptions
- Skill in designing marketing materials
- Skill in writing press releases
- Ability to write a marketing plan

14. TECHNOLOGY

CLE professionals engaged in various roles need technology-related competencies. Such competencies include:

- Knowledge of basic technology concepts and operations
- Knowledge of publishing technology (e.g. word processing, e-publication platforms)
- Knowledge of classroom technology (e.g. presentation software, audience response)
- Knowledge of distance learning technology (e.g. web-conferencing, learning management)
- Knowledge of communications technology (including social media platforms)
- Skill in using word processing software
- Skill in using spreadsheet software
- Skill in using presentation software
- Ability to implement technology decisions
- Ability to train others in the use of technology

15. ETHICS AND PROFESSIONALISM

CLE professionals are expected to demonstrate ethical behavior and a high level of professionalism. Relevant competencies include:

- Knowledge of ethics and professionalism principles
- Skill in identifying ethical issues and problems
- Skill in engaging in critical thinking about ethical issues
- Skill in making informed and reasoned decisions about ethical issues
- Ability to identify and resolve ethical issues