



Core Competencies in Association Professional Development

2009 Update

These competencies are general descriptions of the behavior or actions needed to successfully perform the association professional development (PD) function. This document represents the broad professional development landscape. There are varying roles within the PD function and the particular mix of competencies needed by role will vary.

As updated by the 2007-2009 Professional Development Council led by the Knowledge Committee:

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I. PERSONAL, MEMBER, AND ORGANIZATIONAL LEARNING

A. Personal Learning

1. Identify your career/learning goals, learning needs, and learning style preferences
2. Develop and implement a personal learning plan based on your goals and learning needs
3. Acquire new knowledge and skills through a range of learning methods (both formal and informal)
4. Take responsible risks in order to accelerate learning
5. Seek out colleagues in order to share information and create new knowledge
6. Integrate newly learned knowledge and skills into your work
7. Monitor and adjust your learning plan as needed based on changes in your career goals and your evolving learning needs
8. Evaluate your success in and adjust your approach to identifying, acquiring and applying new knowledge

Knowledge Needed:

- Available methods, tools and resources to support your learning

B. Member and Other Stakeholder Learning

1. Develop and implement an overall knowledge (or learning) strategy to meet the needs of your membership or field represented
2. Develop and implement the necessary architecture to support the knowledge (or learning) strategy
3. Model a learning culture for your membership and other stakeholders
4. Offer diverse and varied learning opportunities for members
5. Support and promote members' continuous learning
 - Provide guidance and tools to members (and other stakeholders) to assist in their learning
 - Compile and communicate to members learning resources offered by your association and other sources

Knowledge Needed:

- Principles of and strategies to foster a learning culture
- Available methods and tools to support and promote member learning

C. Organizational Learning

Note: If your Human Resources department is in charge of organizational learning, see how you can contribute your expertise.

1. Develop an organizational learning strategy for your association
2. Develop and implement the architecture to support the organizational learning strategy
3. Model a learning culture in working with staff and volunteers
4. Support and promote continuous learning among staff
 - Provide guidance and tools to assist in their learning endeavors
 - Compile and communicate learning resources offered by your association and other sources
5. Encourage and reward responsible risk-taking and innovation

Knowledge Needed:

- Principles of and strategies to foster a learning culture
- Available methods, tools and resources to support and promote staff learning

II. PLANNING PROFESSIONAL DEVELOPMENT PROGRAMS, PRODUCTS, AND SERVICES

A. Research and Analysis

1. Define the research question / intent (needs assessment, environmental scan, awareness, image, satisfaction, feasibility, competitive analysis, segmentation, outcomes evaluation, etc.)
2. Ensure cross-functional team involvement, as appropriate
3. Select and implement appropriate research design, methods and instruments
4. Develop a system to track research data
5. Analyze the data in an unbiased manner
6. Report data in a way that supports decision-making
7. Use the information gained to set priorities, change existing, and create new programs, products, and services to accomplish the department's strategic priorities and business plan

Knowledge Needed:

- Research questions related to professional development planning
- Research methods and instruments available and the strengths and limitations of each
- Data tracking systems available and the strengths and limitations of each
- Data analysis
- Data reporting

B. Strategy Development

1. Identify department/program strategic priorities that support the association's strategic plan, are based on market research, internal data and experience and input from members, staff, and other stakeholders
2. Develop clear and measurable objectives for each strategic priority.
3. Develop an implementation plan (tasks required to accomplish the strategic priorities and responsible parties and deadlines)
4. Establish and implement mechanisms to monitor plan progress and outcomes

Knowledge needed:

- Association's strategic plan
- Available market research and internal data
- Relevant stakeholders
- Elements of a strategic plan
- Mechanisms to monitor plan progress

C. Business Planning

1. Identify department/program goals and objectives and the strategies and tactics for achieving these
2. Evaluate data from a variety of sources (market research, needs assessment, trend monitoring, benchmarking, evaluations)
3. Develop a business plan (including financial projections, breakeven points, total costs, intangible benefits) for new and existing programs, products and services
4. Develop an implementation plan (tasks required to accomplish plan and responsible parties and deadlines)
5. Establish and implement mechanisms to monitor plan progress and outcomes

Knowledge needed:

- Association's strategic priorities
- Department's strategic priorities
- Available market research and internal data
- Relevant stakeholders
- Elements of a business plan
- Mechanisms to monitor plan progress

D. Professional Development Program Design

1. Evaluate the need to identify and keep updated the field's body of knowledge (and/or competencies for specific roles) and do so, as appropriate
2. Conduct a gap analysis of existing programming against the field's body of knowledge, as appropriate
3. Align educational programming with the field's body of knowledge, as appropriate
4. Utilize data from a variety of sources (market research, needs assessment, trend monitoring, benchmarking, evaluations) in program design
5. Identify program target audience
6. Consider the diversity of learners and groups of learners in program design
7. Incorporate an understanding of the conditions necessary for successful adult learning in program design
8. Identify program goals, learning objectives, and success metrics (examples, quality of content experts/instructors, learning outcomes, attendance, revenue)
9. Assess the need for and requirements of, and secure continuing education unit approval for education programs, if applicable

Knowledge Needed

- The role of a field's body of knowledge in association education
- Methods available to identify and update a field's body of knowledge and the strengths and limitations of each
- Gap analysis methods and instruments available and the strengths and limitations of each
- Adult learning principles
- Instructional design principles
- Writing learning objectives
- Requirements of continuing education unit approval from relevant organizations

III. DEVELOPMENT AND DELIVERY OF EDUCATIONAL PROGRAMS, PRODUCTS, AND SERVICES

A. Program Development

1. Develop the program curriculum based on program goals and learning objectives, as appropriate
2. Implement a call for proposals based on program goals and learning objectives, as appropriate
3. Develop and apply guidelines for selecting quality content experts and instructors
4. Consider the diversity of learners and groups of learners in program development (including persons with disabilities)
5. Incorporate an understanding of the conditions necessary for successful adult learning in program development
6. Consider sustainability and environmental implications in program development

Knowledge Needed

- Adult learning principles
- Instructional design principles
- Learning style conceptual frameworks and tools
- Typical stages in the development and mastery of new knowledge and skills
- Options for call for proposal delivery and the strengths and limitations of each
- Sustainability options and the strengths and limitations of each

B. Program Delivery

1. Identify appropriate delivery methods to meet the program goals and learning objectives
2. Develop and implement orientation, training, and continuous improvement guidance for content experts and instructors
3. Consider sustainability and environmental implications in program delivery

Knowledge Needed

- Delivery methods available and the strengths and limitations of each
- Extent to which your target audience has access to the delivery vehicles being considered
- Sustainability options and the strengths and limitations of each

C. Legal, Contracts and Agreements

1. Develop program processes and procedures that minimize the association's legal liability
2. Develop and implement contracts and agreements, within your authority
3. Seek legal counsel with expertise in association education to assure that internal and external program processes and procedures are legally defensible
4. Document program development and operational processes and procedures

Knowledge Needed:

- Legal issues associated with the development and implementation of educational activities
- Essential elements of contracts and agreements

D. International Considerations

1. Assess the viability of going "global" versus delivering domestic courses internationally
2. Assess the availability and access to technology in the countries / regions you target
3. Assess cultural approaches to communication and learning in the countries / regions you target
4. Assess the non-learning desired or needed outcomes of target audience (awarding continuing education units, certificates, photographs, invitation letters, etc.)
5. Assess the logistics of international programs (examples: payment systems and conversion rates, collections)
6. Consider the impact of educating internationally on other areas of the association
7. Consider the availability of local instructional design and instructor talent

Knowledge Needed:

- Global standards, practices, cultural approaches and customs as they relate to association education

IV. MARKETING PROFESSIONAL DEVELOPMENT PROGRAMS, PRODUCTS, AND SERVICES

A. Marketing Plan and Tactics

1. Define the scope of the market and identify target segments and key stakeholder groups in building participation in professional development programs
2. Identify unique value proposition, preferred positioning and distinctive brand for professional development programs products and services
3. Consider data and experience gained from market research, needs assessment, trends monitoring, benchmarking, evaluations and strategic planning
4. Develop and implement a marketing plan(s) to support the identified positioning and branding and promote professional development programs, products and services
5. Identify and leverage opportunities for cross-marketing programs with other association products, as appropriate
6. Identify tasks required to accomplish marketing plan and assign responsible parties and deadlines
7. Establish and implement mechanisms to monitor plan progress and outcomes

Knowledge Needed:

- Market segmentation
- Positioning
- Branding
- Marketing strategies and vehicles available and the strengths and limitations of each

B. Marketing Analysis, Reporting and Tracking

1. Develop a tracking system of the marketing data
2. Analyze the marketing data in an unbiased manner
3. Report data in a way that supports decision-making
4. Use the information gained to set priorities, improve existing, and create new programs, products and services

Knowledge Needed:

- Tracking systems available
- Marketing impact report

V. EVALUATION OF PROFESSIONAL DEVELOPMENT PROGRAMS, PRODUCTS, AND SERVICES

A. Evaluation Plan and Methodologies

1. Incorporate the objectives identified in the design phase for the evaluation of professional development program, product, or services
2. Develop and implement evaluation plan(s) using an appropriate evaluation methodology and vehicles
3. Identify tasks required to accomplish the evaluation plan and assign responsible parties and deadlines
4. Establish and implement mechanisms to monitor plan progress and outcomes

Knowledge Needed:

- Various evaluation methodologies available and the strengths and limitations of each
- Levels of educational evaluation and strategies to evaluate each

B. Evaluation Analysis, Reporting, and Tracking

1. Develop a tracking system of evaluation data
2. Identify and track benchmarks (examples: registration trends, attendee demographics/target audience, attendance, revenue, marketing, program evaluation scores, alignment with association strategy)
3. Analyze the evaluation data in an unbiased manner
4. Report data in a way that supports decision-making
5. Use the information gained to set priorities, improve existing, and create new programs, products and services

Knowledge Needed:

- Tracking systems available
- Benchmarks

VI. TECHNOLOGY IN PROFESSIONAL DEVELOPMENT PROGRAMS, PRODUCTS, AND SERVICES

A. Technology Applications and Standards

1. Continually monitor the market for emerging technology options
2. Evaluate the extent to which available technology options meet the program's learning outcomes and your association's and stakeholders' needs and budgets
3. Include selected technology options in your department/program business plan and budget, as appropriate
4. Decide whether to in-source or out-source selected technology options
5. Implement, as appropriate, technology-based options for your organization
6. Keep current on and conform to new and changing technology standards relevant to association education (examples, SCORM, AICC, IMS, ADA)

Knowledge Needed:

- Technology-enabled options for educational activity development, marketing, delivery, registration/purchasing, registration tracking, product sales tracking, attendance and continuing education units / hours tracking, and evaluation, and the strengths and limitations of each
- Implications and pros and cons of in-sourcing and out-sourcing
- Potential vendors
- Target audience access to and capacity to work with the technologies being considered
- Technology standards as they relate to association education

VII. RELATIONSHIP MANAGEMENT IN THE PROFESSIONAL DEVELOPMENT FUNCTION

A. Interpersonal Skills

1. Establish honest, transparent, respectful and healthy relationships with staff, volunteers, and other stakeholders
2. Proactively address conflict and disagreement to productively resolve differences
3. Ensure that diverse perspectives are appreciated and included

Knowledge Needed:

- Conflict resolution
- Effective communication
- Group dynamics

B. Organizational Effectiveness

1. Work together with staff to facilitate sound decision-making and goal alignment
2. Champion broad-based involvement internally and externally to enhance organizational effectiveness
3. Continually strive for customer satisfaction and loyalty

Knowledge Needed:

- Teamwork
- Collaboration

C. Organizational Leadership

1. Communicate department/program purpose, goals, products, and services to staff, leaders, members, and other stakeholders
2. Provide direction to the association on matters related to member professional development
3. Advocate for new member education programs, as needed
4. Advocate for learning/professional development plans as a part of the organization's performance planning and appraisal process

Knowledge Needed:

- Communications strategies

D. Strategic Partnerships

1. Identify and target appropriate and potentially effective partnerships in support of the department's strategy and business plan
2. Develop and/or implement a system to consider and prioritize possible partnerships
3. Collaborate with potential partners to establish mutual goals, determine relative strengths and weaknesses
4. Determine and document the relative responsibilities of each partner, timelines, and financial arrangements
5. Seek legal counsel before finalizing partnership details/agreement/relationship
6. Monitor the effectiveness of partnerships and determine whether to continue, adjust or end the agreement, as necessary

Knowledge Needed:

- Association policies and procedures regarding strategic partnerships

VIII. MANAGEMENT AND ADMINISTRATION OF THE PROFESSIONAL DEVELOPMENT FUNCTION

A. Staffing

1. Determine and maintain appropriate staff size and composition to accomplish department/program purpose and goals
2. Develop and keep current staff position descriptions
3. Orient new staff to the field, association, association mission, department/program purpose and goals, and position description
4. Periodically define and communicate staff goals and expectations
5. Encourage and support staff professional development and growth
6. Manage relationships between staff and consultants/vendor partners
7. Consider and manage the diversity of an evolving work environment and workforce (examples: virtual offices, telecommuting, use of consultants, staff travel, staff of differing generations)

Knowledge Needed:

- Applicable employment laws

B. Department / Program Administration

1. Review programs, products, and services periodically for appropriateness, effectiveness, efficiency, cost and return on investment (ROI)
2. Develop and/or implement systems, policies, and procedures for administering programs, products, and services
3. Utilize resources efficiently and creatively to meet member needs
4. Determine need for external consultation/services

Knowledge Needed:

- Data analysis

C. Financial Management

1. Develop detailed budgets for professional development activities
2. Develop and/or implement policies and procedures for committee, speaker and subject matter expert fees and reimbursements

3. Develop and/or implement policies and procedures for soliciting and managing sponsorships for professional development activities
4. Monitor and analyze financial statements periodically and adjust budget and programs accordingly
5. Implement appropriate financial controls (balance sheets, income/expense statements, audits)
6. Review programs, products, and services for cost-effectiveness and return on investment

Knowledge Needed:

- Association policies and procedures regarding program budgeting
- Financial management principles