Models for
HRD Practice

The
Academic
Guide

HRD Professors Network

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AMERICAN SOCIETY FOR
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Section 1:
History of Human Resource
Developer Competencies

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Competency-based education (CBE) may be one of the most significant educational movements that has surfaced in the past 50 years (Boulmetis, 1981). Endorsed at the local, state, and national levels, it has captured the attention of many international educators.

If this remains the case today, then it seems important to examine the history of the numerous declarations and studies of human resource developer competencies in general and ASTD's *Models for HRD Practice* in particular. This examination begins with definitions of competency, especially competency in adult education and human resource development

Definitions of Competency

In the 1989 *Models for HRD Practice* study, the concept of competency was defined as "personal knowledges and skills for producing and delivering the human resource development outputs." The *Models for Excellence* study (McLagan, 1983) identified competency as "an area of knowledge or skill which is critical to the production of key outputs." Shelton (1987) confirms this approach to defining competency as a performance-based process leading to demonstrated mastery of basic and life skills necessary for the individual to function proficiently in society

Knowles (1980), on the other hand, uses a more common definition of competency that equates it with ability, and he asserts that a competency is a cluster of knowledges, understandings, skills, attitudes, values, and interests that are necessary for the performance of a function — in this case it would be the human resource developer function. For purposes of this discussion, Knowles' (1970) general concept of competency has been adopted along with the following definitions of terms: *knowledge* is generalization about experience and internalization of information; *understanding* is application of information and generalizations; *skills* are incorporating new ways of performing through practice; *attitudes* are adoption of new feelings through experiencing greater success with them than with old feelings; *values* are adoption and priority arrangement of beliefs; and *interest* is satisfying exposure to new experience.

Lindeman's (1938) interpretation enriches Knowles' definition by indicating that competency is to carry conviction supported by valid feelings, sound reasoning, and a cultural meaning which clearly comprehends why adults should study and what sort of equipment a human resource developer needs to possess in a given situation.

There is some difficulty with the view of competency in the 1983 and 1989 ASTD studies in that it only includes knowledge and skill. However, competencies are not the only aspect of the ASTD studies. In addition to identifying competencies, the 1983 study identified 15 roles of the training and development specialist and the 1989 study identified 11 roles of the human resource development specialist. These roles were a prominent part

of each study. Eaves (1985), in discussing the basic tenants of role theory suggests that "role," a social concept, provides a means for understanding the relation between an individual and the behavioral expectations of that individual — expectations which are established by individuals fulfilling some function as well as by persons tangential to and/or interacting with the functioning of the role incumbent. This combination of behavioral patterns is called a role set and includes the knowledge, skills, attitudes, values, understandings, interests, and so forth which constitute the respective behavioral pattern(s).

Models for HRD Practice also focused on outputs, quality, and ethical requirements in addition to its full discussion of competencies and roles.

Competency Studies: A Chronological Table

Table 3 is a chronological listing of numerous competency studies that relate to and have contributed to the human resource development field. The five studies undertaken by the American Society for Training and Development (ASTD) were published in 1959, 1974, 1978, 1983, 1989, and are listed in chronological sequence along with the other studies. For each study in the table date(s), name of the study, author(s), findings, and significance are shown.

Table 3
A Chronology of Competency Studies

Date(s)	Study Title	Author(s)	Findings Adult Educator/Human Resource Developer is competent in:	Significance
1938	Organic versus Mechanistic Model	Edward C. Lindeman	—Motivation —Relationship between growth and learning —Work experience —Relationships of various disciplines —Techniques of group work	Emphasized adult learning as an organic right, a normal expectancy, a new quality and dimension in education rather than as a sort of charity given to the underprivileged
1948	Context Model of Training	Wilbur C. Hallenbeck	—Community context —Psychology of learning —Materials and methods —Experience/action —Expanding of horizons	Established that training for the field needed to be an engagement in experiencing the various methods and techniques of adult learning, not just telling about adequacy/inadequacy of various methods

Date(s)	Study Title	Author(s)	Findings Adult Educator/Human Resource Developer is competent in:	Significance

1956	Model of Professional Education	Cyril O. Houle	—A sound philosophical concept of adult education
			—Ability to:
			  —implement programs and activities
			  —train leaders
			  —counsel and guide learners
				Indicated role of university professors in helping their graduate students achieve various competencies

1959 First ASTD Study	The Head of the Training Function	Harry S. Belman John E. Bliek	—Instruction, administration, and advising —Development, preparation, and evaluation of programs —Professional activities —Related and unrelated non-training activities	Was the first ASTD systematic attempt to determine more precisely what a training director does

1962	A Theory of the Doctorate in Education	Malcolm S. Knowles	—Various knowledges, understandings, skills, abilities, attitudes
			—Basis for:
			  —Competency-based doctoral program in Adult Education and HRD
			  —His/her own competency lists
				Formulated guidelines for developing a competency-based graduate program for training adult educator/human resource developers

1967	Trainer Education and Training	Gerald H. Whitlock	A combination of 16
			—General and specific knowledges of:
			  —Training techniques
			  —Teaching methods
			—Abilities in:
			  —Planning
			  —Executing training
				Combined the first ASTD study with findings of several early writers in industrial training

1967, 1970	Emerging Roles of The Training Director	Gordon Lippitt and Len Nadler	Three major roles and 11 functions related to those roles as sub-roles —Learning Specialist —Administrator —Consultant	Considered by some as ground-breaking in the HRD field

Date(s)	Study Title	Author(s)	Findings Adult Educator/Human Resource Developer is competent in:	Significance
1970, 1980, 1984, 1986, 1987	Competencies for Trainers and Adult Educators	Malcolm S. Knowles	Ten roles and 80 abilities including: —Designer of adult learning experiences —Skilled user of various learning and training techniques	Viewed by many as major contributor/contributions throughout the history of the HRD and adult education fields
1970	Developing Competency Models	Malcolm S. Knowles	—Research —Eliciting the judgment of experts —Task and job analysis —Group participation	Identified a systematic process for developing competency models, including self-diagnosis of needs
1974 Second ASTD Study	Professional Development Manual	Many members of the ASTD Professional Standards and Ethics Committee & Professional Development Task Force (Between 1969 and 1974)	Focusing on phases of the training function including: —Needs assessment, design, materials, and evaluation —Consultant and management roles	Included supporting bibliography for assistance in each competency
1975	Employee Development Specialist Effectiveness	U.S Civil Service Commission	—Career counseling —Consulting —Adult learning specializing —Program managing —Administration of training	Related to Federal Employee Development Specialists
1976, 1979	Core Competencies of a Trainer	Ontario Society for Training and Development Professional Committee	Extensive listing of competency category in: —Knowledge —Understanding —Skill and —Prioritized lists	Identified the competencies unique to trainers and proficiency levels needed in each of four roles; became a foundation to subsequent ASTD studies
1976	Preparing Educators of Adults	Stanley M. Grabowski	—Motivation, needs, participation —Process of learning —Access to resources —Learning/teaching techniques	Distilled a list of 10 competencies of adult educators from a review of numerous studies

ıte(s)	Study Title	Author(s)	Findings **Adult Educator/Human Resource Developer is competent in:**	Significance
'7	Instructional Competencies for Designers	Joint National Society for Performance and Instruction (NSPI)/Division of Instructional Development (DID) — Association of Technology (AECT) Special Certification Task Force made up of over 30 professional practitioners and academics	Sixteen Core Competencies, among them: —Write statements of learner outcomes —Plan and monitor instructional development projects	Was first major attempt toward defining competencies for instructional designers for the purpose of credentialling industrial trainers, media specialists, and other HRD practitioners
78 ıird ASTD ı'' ˉ	Pinto-Walker Professional Training and Development Roles and Competencies	Patrick R. Pinto James W. Walker	Including· —Materials and program development —Managing —Instruction —Research —Professional self-development	Was a nationwide, empirically based research study which resulted in a 14-item factor analysis on what trainers actually do in the present
78	A Delphi Study of Adult Educator Knowledge and Skills	Mark H. Rossman Richard L. Bunning	Knowledge and skills of: —Learners, environment, programming, and process —The field —Self as learner	Was a four-stage Delphi study to identify knowledge and skills needed by adult educators in the next decade, resulting in 48 knowledges and 53 skills in six categories
'79	American Society for Personnel Administration (ASPA) Certification Study	Accreditation Institute	Certification as: —Professional in human resources —Senior professional in human resources	Provided accreditation in the field on two levels and seven functional areas in personnel and labor relations including training and development

Date(s)	Study Title	Author(s)	Findings **Adult Educator/Human Resource Developer is competent in:**	Significance

1981	1981 NSPI/DID Joint Study (AECT)	National Society for Performance and Instruction (NSPI) and Division of Instructional Development (DID) of the Association for Educational Communication and Technology (AECT).	Difficult aspects of:
			—Promoting high standards through:
			   —Research
			   —Definition
			   —Measurement
				Was unsuccessful in resolving issue of competency assessment, but later founded the International Board Standards for Training, Performance and Instruction (IBSTPI)

1982	Comparative Study of Practitioners	Richard Daniel Harold Rose	—Thirty knowledges —Thirty-seven skills	Was first study to compare professors and practitioners
1983 Fourth ASTD Study	Models for Excellence	Patricia A. McLagan Richard C. McCullough	—Fifteen roles —Thirty-one competencies mostly knowledge and skill —One hundred and two outputs	Was first ASTD study based on a series of questions to focus on the emerging direction of the field, with avowed purpose of updating the study later
1984	Organization Development (OD) Self-Development Competencies	Carol Armore	—In possessing a strong self-concept —Focusing throughout on results and forming workable strategies	Gave definition of Organization Development, five phases and eight major competencies for OD practitioners
1984, 1986	Instructional Design Competencies: The Standards (IBSTPI) Study	Rob Foshay Kenneth Silber Odin Westgaard and others from International Board of Standards for Training, Performance and Instruction (IBSTPI)	—Sixteen competencies with accompanying rationales, performances, assumptions, conditions, behavior, criteria	Based on the research conducted by the NSPI/DID(AECT) Joint Certification Task Force; was attempt to move beyond the certification assessment difficulties

1986	Teaching Adults: Professional Vocational Teacher	Robert E. Norton and key program staff	—Six roles
			—Fifty competencies including:
			   —Teaching
			   —Counseling
			   —Evaluating adult learners
				Recognized that in vocational education there are 50 competencies identified and verified as unique and important to the instruction of adults

Date(s)	Study Title	Author(s)	Findings **Adult Educator/Human Resource Developer is competent in:**	Significance
1987	Education A New Perspective on Competence	Michael Collins	Identifying nine sources of the skepticism about competency-based adult education including: —Excessive reductionism —Behaviorist foundations	Warned that competency-based education succumbs to the extremely behavioristic approach to education rather than being concerned with adult learning
1987, 1989	Instructional Perspectives Inventory	John A. Henschke	—Five categories of competencies —Five common factors including: —trust of learners —accommodating learner uniqueness	Made the case for research and practice being closely linked in identifying competencies for HRD/adult educators
1988	Instructor Competencies	IBSTPI	—Fourteen competencies —Ethical standard statements	Directed at the role of Learning Specialist in Human Resource Development
1989 Fifth ASTD Study	Models for HRD Practice	Patricia McLagan & Associates	—Thirty-five competencies —Eleven roles —Seventy-four outputs —More than three hundred quality requirements	Merged Training, Career Development, and Organization Development into a definition of HRD

Issues Related to the Chronological Table

Lindeman (1938) is the earliest contributor to the discussion on competency. He expressed concern over a deep-seated conflict in the United States regarding the purposes of adult education. Lindeman stated theorists' contrasting points of view as follows:

- Those who represent the *mechanistic* viewpoint seem to believe that adult education is designed to meet the needs of illiterate, unfortunate, or underprivileged persons. To such theorists adult education always means extending something which is already here; that is, extending the existing patterns of education to an older group. The ideas with which they surround adult education are consequently quantitative, if not static, in character. At best, such persons seem to think of adult education in naively instrumental terms, that is, in terms of giving these neglected learners something which other people have acquired in the normal course of experience. Among the mechanistic thinkers in this field, one also finds a strong ingredient of philanthropy. They present adult education as a sort of benefit to be given to the underprivileged.
- Those who hold the *organic* point of view, on the other hand, assume at the outset that adult education represents a need that is universal. It is, or should be, designed to meet the needs of all citizens. It is not merely "more of the same," an extension of something that the privileged already enjoy, but rather, a new quality and a new dimension in education. Also, such theorists insist that adult education is a right, a normal expectancy, and not charity. Its purpose is to do something for adults which cannot be achieved by conventional education.

This early contrast of mechanistic and organic viewpoints on the purpose of adult education seems to anticipate and underscore Collins' (1987) assertion that competency-based education programs were developed as a means to counteract the perceived negative characteristics and effects of traditional approaches to education. Although Collins is wary of competency-based educators because of what he perceives to be their strongly behaviorist orientation, he states that proponents have argued that competency-based education emphasizes acquired knowledge instead of the learning process, life coping skills instead of disciplinary content, learner-centered knowledge rather than socially— or institutionally— centered knowledge, learner-relevant goals instead of abstract goals, and curriculum flexibility in response to changing environmental conditions rather than curriculum rigidity.

Lindeman (1938), however, argued, in competency terms, that an adult educator or human resource developer should know:

- First, a great deal about motivational psychology, the purposes of people, processes by which purposes come into being, cultural history, logic, ethics, aesthetics, and contemporary social movements including corporate purposes
- Second, the relation between genetics (growth) and learning
- Third, what the work experience of students is and the way the students' life is being conditioned by work
- Fourth; how to interpret and make use of the knowledge of various disciplines
- Fifth, how to use techniques of group work and be able to participate in a group activity.

In 1948, Hallenbeck (Brookfield, 1988) focused on the need for the adult educator to have knowledge of instructional methodology and materials, adult psychology, sociology of adulthood, history and philosophy of adult education, administration, community organization, programming function, and knowledge of a particular subject.

Six years later Houle (1956, in Eaves, 1985) casts his competency list more in terms of abilities. He says adult educators should achieve:

- A sound philosophical conception of adult education
- Knowledge of basic sociological and psychological concepts germane to adult education
- Knowledge of various agencies in which adult education is practiced
- The ability to plan, develop, implement, and evaluate educational activities
- The ability to train leaders
- The ability to council and guide learners
- The ability to develop and promote programs
- The ability to coordinate and supervise program and personnel
- The ability to evaluate
- Personal effectiveness and group leadership

In 1959, Belman and Bliek conducted the first ASTD competency study. They made the first systematic attempt involving ASTD in determining what a training director's duties and responsibilities were. The 1,028 tasks were grouped into 43 task areas and allocated among eight separate, logically induced categories: instruction responsibilities, development and preparation of programs, training evaluation, adviser responsibilities, administration of training, general professional activities, non-training activities-related, and non-training activities-unrelated. As examples of the forty-three task areas, one task area for each of the previously mentioned eight categories in the order they were listed included: conducting training

conferences, assessing training needs, following up on performance of trainees, counseling employees on self-development, assisting line management in budgeting training costs, keeping informed on new training techniques, serving on advisory committees, and writing job descriptions.

In 1962, Boston University invited Malcolm Knowles to start a graduate program in adult education. As a foundation to this program, he published "A General Theory of the Doctorate in Education" (Knowles, 1962). His statement of the purpose for the theory is still important and pertinent to development of a curriculum guide for *Models for HRD Practice.* Knowles suggested that the theory's purpose was to provide guidelines that result in a clear image of curriculum, provide a consistent basis for planning, promote functional evaluation and program improvement, and define areas of freedom for individualization.

Knowles (1962) listed relevant competencies for each required function or role set at each stage in the program, some for an educational generalist, and others for an adult education specialist. The eight competencies relating to the role of adult education specialist were an understanding of the function of adult education in society; ability to diagnose adult educational needs and translate these into objectives and programs; an understanding of the unique characteristics and processes of adults as learners; ability to plan and execute strategies of institutional and community change; an understanding of the theory and dynamics of organizations; skill in selecting, training, and supervising leaders and teachers; skill in institutional management; specialized competencies in the preparation of mediated materials, organization, and community consultations; and human relations training.

In 1967, Whitlock combined the findings from the first ASTD study with some findings of earlier writers in industrial training and identified 16 general and specific knowledges, understandings, and abilities of trainers, namely:

- General knowledge of an industry and its constituent elements
- Understanding of the learning process with particular emphasis on adult education
- Specific knowledge of the purpose of training
- Management skills and labor relations
- Teaching and evaluation methods
- Curriculum development
- Various training techniques such as role play, incident process, simulation games and audio-visuals
- Abilities of conducting learning-needs analysis, preparing written course outlines and manuals
- Developing reinforcement and training transfer exercises
- Selecting and training instructors

- Counseling individual employees and administrators
- Planning new and revamping old programs
- Developing funding proposals
- Administering the training department, and resources
- Providing appropriate departmental equipment
- Marketing training programs as well as assisting in maintaining a high level of employee morale.

Nadler (1970) and Lippitt and Nadler (1967) identified three major HRD roles: Administrator, Consultant, Learning Specialist and 11 functions:

- Developer of Personnel, Supervisor of Ongoing Programs, Maintainer of Relations, Arranger of Facilities and Finance within the scope of the Administrator role
- Advocate, Expert, Stimulator, and Change Agent within the scope of the Consultant role
- Facilitator of Learning, Curriculum Builder, and Instructional Strategist within the scope of the Learning Specialist role.

Knowles' theory of the doctorate as well as his teaching experience became the basis for his own well-researched competency lists which include some 8 to 10 roles with 70 to 80 abilities (1970, 1980, 1984, 1986, 1987). Roles include Learning Facilitator, Program Developer, Administrator, Teacher, Designer of Learning Experiences, Selector of Methods, Techniques and Devices, Skilled User of Various Learning Techniques, and Consultant. The abilities noted include, but are not limited to:

- Constructing a wide variety of program designs to meet the needs of various situations (basic skills training, developmental education, supervisory and management development, organization development, etc)
- Functioning as a learning facilitator (concept and theory of adult learning, designing and implementing learning experiences, helping learners become self-directing, selecting and using learning methods, techniques, and materials)
- Functioning as an administrator (with regard to organization development and maintenance, and program administration)
- Describing and implementing the basic steps (e.g., climate setting, needs assessment, formulation of program objectives, program design, program execution, and evaluation) that undergird the planning process in adult education.

Started in 1969 and completed in 1974, ASTD's second major project focusing on competencies was entitled *Professional Development Manual.* Knowles' work was a major influence on this project. It presented 137 competencies mostly stated as abilities within the following phases of training: needs assessment and problem identification, objectives planning, training design, development of training materials, training effort,

evaluation, and follow-up. Sections were added on communication skills and abilities as well as management skills and abilities in the trainer's role as resource. Bibliographical materials for each competency were included.

The U.S. Civil Service Commission (1975) targeted federal employee development specialist effectiveness when they identified five fundamental roles and 77 necessary competencies with additional sub-competencies distributed among the roles. The roles with general responsibilities or competency areas are as follows:

- Career counselor, who facilitates the selection of training and development alternatives primarily for career development purposes
- Consultant, who is concerned with research and development and with providing advice and assistance on a variety of organizational problems
- Learning specialist, who designs, develops, conducts, and evaluates training
- Program manager, who sets policy, manages the function, and interacts with top management
- Training administrator, who coordinates, and maintains the support services for the training function.

In 1976, the Ontario Society for Training and Development (1979) identified an extensive list of knowledge, understanding, and skills within 11 core competencies unique to trainers, and proficiency levels for four roles: Instructor, Designer, Manager and Consultant. The 11 core competency/activity areas included:

- Administration
- Communication
- Course design
- Evaluation
- Group dynamics process
- Learning theory
- Human resource planning
- Person/organization interface
- Teaching practice
- Training equipment and materials management, and
- Training needs analysis.

Also identified were a number of resource texts related to each of the four roles of training and development plus texts in a general category that encompassed multiple roles.

Grabowski (1976), after reviewing competencies in several studies, distilled to 10 the competencies of adult educators:

- Understands and takes into account the motivation and participation patterns of adult learners
- Understands and provides for the needs of adult learners

- Is versed in the theory and practice of adult learners
- Knows the community and its needs
- Knows how to use various methods and techniques of instruction
- Possesses communication and listening skills
- Knows how to locate and use educational materials
- Has an open mind and allows adults to pursue their own interests
- Continues his or her own education
- Is able to evaluate and appraise a program.

In 1977, the Association of Educational Communication and Technology's (AECT) Special Certification Task Force within the Division of Instructional Development and the National Society for Performance and Instruction (NSPI) made the first major attempt toward credentialing industrial trainers, media specialists, and other HRD practitioners. Sixteen core competencies resulted. They became the basis for, indeed the same as, the 1986 IBSTPI list (discussed later in this section) published as *Instructional Design Competencies.*

Pinto and Walker started the third major ASTD study in 1976 and completed it in 1978. This study project on competencies had fourteen activities or factors:

- Program design and development
- Manage external resources
- Job/performance-related training
- Individual development planning and counseling
- Training research
- Group and organization development
- Develop material resources
- Professional self-development
- Manage the training and development function
- Manage internal resources
- Maintain working relationship with managers
- Conduct training and development needs analysis
- Conduct training programs
- Determine appropriate training approach.

Conducted in 1976 and published in 1978, Rossman and Bunning's study (Brookfield, 1988) identified 48 knowledges and 53 skills, clustered into six categories: adult educator, field of adult education, adult learner, adult education environment, adult education programming, and adult education process. The six highest priority knowledge statements dealt with adult psychology, ever changing nature of the adults and their needs, oneself as a person, change process, contemporary society, and functions of the adult educator. The highest priority skill statements were communicating (including listening skills), continuous self-improvement, systematic in-

quiry, critical assessment and problem solving, diagnosing educational needs of the individual, designing learning experiences based on need, initiating the self-actualization process in the adult, encouraging creativity, and conducting learning experiences based on need.

Knox (1979), in *Enhancing Proficiencies of Continuing Educators*, sought to put forward the concept of proficiency in contrast to competence. He suggested that the concept of proficiency is related to both knowledge and action and that professional proficiency is what most highly effective practitioners would be expected to achieve. He further indicated that the dictionary definition of proficiency emphasizes high levels of competence, adeptness, and confident control based on expertise, skill, and knowledge acquired through learning and experience. According to Knox, competence emphasizes only minimum, satisfactory, or moderate levels of ability. He adds that although this focus on minimum achievement might be appropriate for high school students who are working below par, it is inadequate for the specification of optimum proficiency by continuing education practitioners. Knox's argument never seemed to take hold with anyone else. Furthermore, almost without exception, all the competency models have the type of assessment instrument which identifies various levels of performance, including "high," "advanced," or "superior," or other expressions referencing a superlative level of functioning.

In 1979, the American Society for Personal Administration Certification study provided two levels of accreditation each for specialists and generalists in the field, and identified seven functional areas in personnel and labor relations including training and development.

In 1981, the National Society for Performance and Instruction (NSPI) and the Division of Instructional Development (DID) within the Association for Educational Communication and Technology (AECT) conducted a joint study which was unsuccessful in resolving the issue of competency assessment. Later the study group dissolved and formed the International Board of Standards for Training, Performance, and Instruction (IBSTPI) to undertake the difficult task of promoting high standards through research, definition, and measurement.

In 1982, Daniel and Rose (Brookfield, 1988) compared professor and practitioner competencies on 30 knowledges and 37 skills. The six highest priority knowledges ranked as follows: the ever changing nature of the adult and his needs; professionalization — a sense of mission and purpose and of how the professional functions; community resources; designing innovative programs; functions of the adult educator; and the community — its organization and power structure as well as methods of development. The eight skills ranked as highest priority were communicating (including listening); administration or management of adult programs; leadership;

group, academic and/or community; continuous self-improvement; designing learning experiences based on need; being accountable to the public; fiscal aspects of the education process; and, as a change agent for himself, individuals, organizations and/or the community.

In 1983, ASTD published its fourth major study. Most of the studies up to this time had produced models focused on tasks and broadly defined roles relating to the training and development field. In 1981, ASTD launched this major study in competencies, entitled *Models for Excellence*, with 102 outputs, fifteen roles and thirty-one competencies. Most of the competencies were stated in terms of understandings or skills. It was the first study based on a series of questions focused not on what training and development practitioners actually did on the job, but focused on the emerging direction of the field.

The competencies related to such broad abilities as computer competence, intellectual versatility, and relationship versatility; such knowledge as career development; understandings related to such matters as adult learning, industry, organizational behavior, organization, personnel/human resources field, training and development field, training and development techniques; and such skills as:

- Audiovisual
- Competency identification
- Cost-benefit analysis
- Counseling
- Data reduction
- Delegation
- Facilities
- Feedback
- Futuring
- Group process
- Library
- Model building
- Negotiation
- Objectives preparation
- Performance observation
- Presentation
- Questioning
- Records management
- Research
- Writing.

The roles identified were Evaluator, Group Facilitator, Individual Development Counselor, Instructional Writer, Instructor, Manager of Training and Development, Marketer, Media Specialist, Needs Analyst,

Program Administrator, Program Designer, Strategist, Task Analyst, Theoretician, and Transfer Agent.

Armore (1984) gave a definition of organization development (OD) and eight major competencies for OD practitioners. Organization development may be defined as a planned organization-wide effort that is supported from the top to increase organizational effectiveness and health through interventions in the organization "process," using behavioral-science knowledge. The five phases of organization development are entry, assessment, planning, implementation, and evaluation. Armore identified eight competencies as critical to the organization development practitioner:

- Possesses strong self concept
- Develops common understanding
- Uses personal influence effectively
- Applies functional knowledge
- Uses diagnostic skills
- Formulates workable strategies
- Implements strategies effectively
- Focuses on results.

Extensive bibliographic resources were suggested for each of the five phases.

Principal writers, Foshay, Silber, and Westgaard (1986) and the International Board of Standards for Training, Performance and Instruction (IBSTPI) published the results of the 1977 AECT study as *Instructional Design Competencies Manual*. The results were 16 competencies with accompanying rationales, performances, assumptions, conditions, behavior, and criteria, for use by instructional designers, training managers, and training evaluators. The 16 competencies were as follows:

- Determining projects that are appropriate for instructional design
- Conducting a needs assessment
- Assessing the relevant characteristics of learners/trainees
- Analyzing the characteristics of a setting
- Performing job, task, and/or content analysis
- Writing statements of performance objectives
- Developing the performance measurements
- Sequencing the performance objectives
- Specifying the instructional strategies
- Designing the instructional materials
- Evaluating the instruction/training
- Designing the instructional management system
- Planning and monitoring instructional design projects
- Communicating effectively in visual, oral, and written form
- Interacting effectively with other people

- Promoting the use of instructional design.

Norton (1986) and key program staff at the National Center for Research in Vocational Education at the Ohio State University developed a six-module "teaching adults" series within the context of the other 125 modules in the professional vocational-teacher education series. The modules are based on 50 competencies identified as important to the instruction of adults. Among the categories of competencies were these: varying instructional techniques, establishing adult-to-adult rapport, creating a participatory environment, facilitating adult independence, providing for individual differences, increasing learners' confidence, increasing group cohesion, providing needed support services, and being an advocate for adult learners.

Henschke (1987) published his rationale for keeping research and practice closely linked in Adult Education/Human Resources Development. He made the case for five categories of competencies: beliefs and notions about adult learners, perceptions concerning qualities of effective teachers, phases and sequences of the adult learning process, teaching tips and learning techniques, and implementing the prepared plan. In 1989, he engaged more than 600 adult educators in identifying common factors of adult instructors: teacher trust of learners, accommodating learner uniqueness, sensitivity toward learner needs, experience-based learning techniques, and preparation and delivery of instruction.

Collins (1987) became concerned about the competency-based adult education movement and identified nine sources of skepticism about it:

- Excessive reductionism
- Behaviorist foundations
- Quest for certainty
- Busyness syndrome
- Schooling connection and bureaucratization
- Anonymity and serial thinking
- Bureaucratic and political regulation versus communicative competence
- Industrial-commercial nexus
- Threat to adult education principles.

He warned that in wrapping a cloak of competence around an essentially behavioristic and stipulatory approach to education, its initiators inadvertently identified the theme for undermining the illusion that their technique-ridden obsession guarantees concomitant performance. He further asserted that the competency-based mode of expression led to the mistaken belief that human competence in various fields of endeavor can be reduced to a meaningful, finite number of statements representing observable external data prior to measurement.

According to Gilley and Eggland (1989), IBSTPI identified 14 competencies and a number of ethical standards associated with the role of Learning Specialist in human resources development.

In 1987, *Models for HRD Practice*, ASTD's fifth major study in competencies was launched with more than 800 people involved in the revision. It was published in 1989. The foreword states that *Models for HRD Practice* (McLagan, 1989b) builds on the work begun in *Models for Excellence* (McLagan, 1983). But *Models for HRD Practice* goes beyond the scope of *Models for Excellence*. The most important changes include the addition of organization development and career development to training and development as the key components of human resource development. Study results presented 35 updated competencies, 11 roles, more than 400 quality requirements, 74 outputs, 13 ethical requirements, and 13 future key work and business forces most likely to affect the future. Application tools are also provided in *The Practitioner's Guide* (McLagan, 1989c) and *The Manager's Guide* (McLagan, 1989a) Of the competencies from the 1983 study, 22 were retained Nine competencies from the 1983 study were dropped, including such broad abilities as relationship versatility; knowledges such as career development; understandings such as personnel development and human resources, training and development field, and training and development techniques; and skills such as audio-visual, counseling, futuring, and library. Thirteen new ones were added: such knowledge as self-knowledge, such understandings as subject matter, business, organization development theories and techniques, career development theories and techniques, and training and development theories and techniques; and such skills as electronic systems, project management, coaching, relationship building, information search, observing, and visioning. Each of the 35 competencies in this 1989 study was assigned to one of the following four competency categories: *technical*, functional knowledge and skill; *business*, having a strong management, economics, or administration base; *interpersonal*, having a strong communication base; and *intellectual*, knowledge and skills related to thinking and processing of information. Only four of the roles from the 1983 study were retained in this study: Evaluator, Marketer, Needs Analyst, and Program Designer. Seven new roles were added: Researcher, Organizational Change Agent, HRD Materials Developer, Instructor/Facilitator, Administrator, HRD Manager, and perhaps most important, Individual Career Development Advisor.

Concluding Comments

Other Adult Education/HRD competency studies exist, but either the author has not discovered them or chose not to include them because they were not central to HRD competencies. The ASTD competency studies have their own particular historical and theoretical bases. They are, however, certainly related to the competency studies from other sources reviewed. Each study has its own findings, significance, strengths, and weaknesses. Surely more HRD competency studies will be conducted in the future. Because the past is prologue for the future, the refinement and soundness of these continued efforts will provide improvements.

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