CHAPTER 3

Defining Competencies and Critical Requirements for a Job

**Experiential Learning Activities (EL)**

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# EL 1: Case: Defining Competencies of effective managers?

Most of us have experienced working with or observing someone carrying out managerial work. This might be a person you worked for in a summer job or career. The managers might have been carrying out tasks such as coordinating the work of a team or a group of volunteers. Or, the manager might be supervising the completion of a project. You are asked to develop a competency framework based on your experiences you have had with them.

**Task 1:** The first part of this exercise asks you describe two critical incidents of experiences you have had or observed which, for you, illustrates effective management and two which illustrate less than effective management.

**Task 2:** You are then asked to pool together your incidents with4-5 class members so that you have a 16-20 incidents to work with.Each message, statement, idea, or concept should be separated from the rest so that it can be sorted and displayed in relationship to other categories. You will be left with a large pile of pieces of paper, where each piece represents an idea, statement, or concept. You might also wish to identify 1-3 competencies for each incident and describe each competency by the knowledge, skills, ability and other characteristic identified.

**Task 3:** A third part to this exercise asks you to identify competencies which are more important to a goal such as being an effective manager. You might simply define 5-6 top competencies or critical competencies. Or, you might wish to identify those which are distinctive, core, and threshold.

* *Distinctive Competencies:* Competencies that are difficult for others to replicate
  + Have enduring advantage (ensure long term success)
* *Core Competencies:* Crucial to success because of their linkage to goals
  + Cannot remove as it will affect goal achievement
* *Threshold competencies:* required and expected for people in this field

These definitions of distinctive and core competencies are based onBryson, J.M., Ackermann, F., & Eden, C. (2007) and build on the work of others. Richard Boyatzis compiled a competency framework distinguishing effective and less effective public and private managers and used the terms distinguishing/core and threshold competencies (while essential to a manager, are not causally related to superior performance).[[1]](#endnote-1) Prahalad and Hamel have used the term core competencies to describe competencies which are unique and hard to imitate. This definition is slightly different from the one by Bryson, Ackerman, & Eden (2007). [[2]](#endnote-2)

The Bryson, J.M., Ackermann, F., & Eden, C. (2007) article in Public Administration Review defines distinctive competencies as those which are difficult to replicate (similar to the above definition). However, they define core competencies as those which are crucial to success because of their linkage to goals or aspirations. If you remove this competency, goal achievement is unlikely. They say that a core competency will not be distinctive if it is easy for others to emulate. Core competencies are crucial for goal achievement because of their linkage to goals and because they are hard to emulate.[[3]](#endnote-3)

In a third task, you should define a higher level managerial goal such as being successful as a manager in a certain area. Then, organize your competencies with the perspectives of the SHRM BSC using the following figure.



You should then label the distinctive competencies, threshold and core competencies. Finally, identify the core competencies which are crucial to success because if they were removed, goal achievement would not occur.

**Discussion Questions**

* Identify competencies which are distinctive [difficult for others to replicate & have enduring advantage (ensure long term success)].
* Identify competencies which are core (crucial to success because if they were removed, goal achievement would not occur). That is, in this case, the manager would not be effective in implementing his goals.
* Identify threshold competencies which are required and generally important for people in this field.

# EL 2: Case: Defining some of the Distinctive and Core Competencies in Beeches Management Centre

The Beeches Management Centre (BMC) in Belfast is part of a social service system in Northern Ireland that provides management and organizational support to health and personal social service organizations. Most of its funding is from service contracts with some 18 health and personal social service organizations. It is organized into three units: with 35 staff in management development, 24 in nursing and midwifery, and 18 in financial services. In seeking to stay on the cutting edge of what they do, they involved staff and stakeholders and articulated their mission statement which crystallized their commitment “to be recognized as the main regional provider of education, learning and organizational development” and in working with partners to achieve objectives related to improving “health and well-being of the population.” [[4]](#endnote-4)

The staff identified three critical success factors which included ‘developing client capacities to deliver high quality health and social care services’, ‘helping them manage critical business issues in affecting delivery of these services,’ and ‘enhancing their performance profiles and image in informing others of their successes’.

Eight distinctive competencies were identified relating to abilities to: (i) draw on a relatively secure resource base, (ii) make use of good relationships with key actors in service, (iii) profile and share learning, (iv) draw on knowledge of service and policy change, (v) make use of partnering skills with clients, (vi) make use of product development skills (vii) draw on high-level training skills, and (viii) make continuous of the Beeches facilities. These distinctive competencies are thought of as difficult for others to replicate and have an enduring advantage (ensure long term success). Four threshold competencies which are expected of most people in these organizations are those relating to (i) management and organizational development, (ii) consultancy, (iii) facilitation, and (iv) partnering.

**Task 1:** Organize the above competencies to meet the goals of different perspectives: client, internal process, finance, and staff. The client goal focused on improving ‘services to patients and clients by raising management and professional skills….’ The internal process goal relates to improving the “processes so that programs and services are relevant” to current and future needs and the financial goals are “to secure funding levels to deliver our mission statement…” The staff goal in the learning and process perspective points to the need to develop ‘a highly skilled and dynamic BMC team’ to meet client goals of management, education and support.[[5]](#endnote-5)

**Task 2:** Organize the above competencies to show the linkages between each other in the following strategy map.

**Task 3:** Identify any core competencies.



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# EL 3: Defining team norms, and performance expectations and competencies

Most of us have experienced conflicts or disagreements when working with others in groups or teams. Often, these disagreements are concerned with different norms, expectations over appropriate ways of working together:

* She never arrived for team meetings on time and when she came, she didn’t have anything done.
* He was so convincing and persuasive that he got us to take on a project that we were really not interested in. He had worked with the organization before and, doing another project with them would be good experience. The frustration is that we carried him during the entire project, a project we had no interest in.
* During the first meetings, all we did was talk, talk, talk. Nothing got done. Then, we had a crisis and only a week to do the project.

Performance norms, expectations, and competencies an important part of working in teams, just as they are important in a job description. **Norms** and **expectations** are ground rules for working together and illustrate what we should do or not do in a situation. They are rules of behaviour or expected ways of behaving that people in a group expect of others. For example, ‘when people say they will do something, we expect that will do it.’

**Values** are mental models of good or bad that guide actions. Values are what people hold to be worthwhile. There are instrumental values that we accept in organization or society to do well and get ahead. There are core or fundamental values that often are defined by culture and society. **Beliefs** are what people know to be true. While a value is an assumption of what ought to be, a belief is an assumption of what is or will result. While a person might value participation, in a cause to improve group effectiveness, he or she may not believe that participation will actually improve effectiveness.[[6]](#endnote-6)

This exercise is based on the assumption that the success of a team-like environment is based on the ability to develop positive norms and customs up front, before the project begins. It encourages you to define the effective and less effective behaviours in working together. Use these incidents to define norms and expectations for working well together in a team project in your class.

In carrying out this task, you might want to discuss the following definitions of norms, expectations, values, and beliefs. As a first step, answer the questions below. Think about experiences you have had working with others in groups on class projects or work experiences. Identify one example of your best experiences and one example of a less positive experience. For the best and not-so-positive experiences, describe examples of incidents illustrating unusually effective or ineffective performance. You might wish to duplicate thisform or record your responses on separate sheets of paper. Write one example for each question.

Think of an example of a group experience that worked especially well. Describe this experience and why it worked well. What expectations and norms were illustrated? Based on this, what norms and expectations would be useful for our group?

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Think of an example of a group experience that **did not** work especially well. Describe this experience and why it worked well. What expectations and norms were not illustrated? Based on this, what norms and expectations would be useful for our group?

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Think of an example of a group member who was especially helpful in a group. Describe this person and why he or she was helpful. What expectations and norms were illustrated? Based on this, what norms and expectations would be useful for our group?

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Think of an example of a group member who was **not** especially helpful in a group. Describe this person and why he or she was not especially helpful. What expectations and norms were not illustrated? Based on this, what norms and expectations would be useful for our group?

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## Additional Questions for Identifying Competencies, Norms, and Expectations

Think of an example of a group experience that worked especially well. Describe this experience and why it worked well. What expectations and norms were illustrated? How were they implemented?

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Think of an example of a group experience that **did not** work especially well. Describe this experience and why it worked well. What expectations and norms were not illustrated? How were they implemented?

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Think of an example of a group member who was especially helpful in a group. Describe this person and why he or she was helpful. What expectations and norms were illustrated? How were they implemented?

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Think of an example of a group member who was **not** especially helpful in a group. Describe this person and why he or she was not especially helpful. What expectations and norms were not illustrated? How were they implemented?

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Based on the above incidents, each individual should make a list of the norms and expectations of others in the following areas: (i) values and beliefs about working together, (ii) values in treating others, (iii) our responsibilities as employees/students.

Values and Beliefs in working together: What can we do to make the team work well? We value: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Values and Beliefs in treating others: What can we do to make the team work well? We value:

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Our Responsibilities as Employees/students: What can we do to make the team work well? What are things we can do not do or do not want done? We value:

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Norms and Expectations: What are tangible things we need to do and not do?

What we need to do: (i.e. Be on time for all meetings) \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

What we should not do: (i.e. Dominate the conversation with our ideas) \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

# EL 4: Identifying different types of competencies for a CAO

Define distinguishing, core and threshold competencies for a CAO (Chief Administrative Officers) in a municipal government in more effectively delivering services to the public; building on figure 3.1 in the text:

* *Distinctive Competencies:* Competencies that are difficult for others to replicate & have enduring advantage (ensure long term success)
* *Core Competencies:* Crucial to success because of their linkage to goals and cannot remove as it will affect goal achievement
* *Threshold competencies:* required and expected for people in this field

# EL 5: Reviewing a job description of an Executive Director

Review the following job description for the Executive Director of an agency that focuses on providing emergency shelter and other essential services to clients suffering from multiple problems including alcoholism, mental illness, and drug abuse. What other competencies might you suggest? Which are distinctive and core? After reviewing the chapter 7 on Selection Strategies, update the questions you might ask in interviewing potential candidates.

**Sample Job Description for the Executive Director**

**A: Position Summary**

Reporting directly to a volunteer Board of Directors, the Executive Director is accountable for leading the organization. This leadership entails supporting and directing the Board's activities through subordinate managers responsible for such diverse programs as emergency shelters for adults and adolescents, a housing complex, a day care centre, psychiatric group home and downtown outreach service.

**B: Key Duties**

*1. Leads the Society by providing support and direction to program line managers and support staff within the Society.*

* Ensures the highest possible quality of care is delivered to the Society's clients by co-ordinating the program evaluation process throughout the organization.
* Hires, orients, trains and assesses the performance of the management team and administrative support staff. Responsible for the development of each of his/her managers and staff.
* Provides guidance and direction when required to individual line managers.

*2. Manages the budget process and other administrative programs within the Society***.**

*a. Budgets*

* Establishes appropriate budget. development procedures, prepares administration budget and acts as a resource to line managers. Reviews program budgets for conformance to established guidelines.
* Submits Society budget to the Board for approval and makes recommendations on various program budgets.
* Implements and monitors budget on an ongoing basis throughout the fiscal year.
* Negotiates with government funding agencies.

*b. Finance*

* Oversees the accounting function ensuring goals with respect to timeliness, accuracy and adherence to reporting requirements are met.

*c. Personnel*

* Manages the Board's personnel function by providing direction with respect to labour relations (excluding collective bargaining), recruitment, performance management, training and orientation.
* Resolves grievances with the union that refer to existing clauses in the collective agreement
* Implements and manages a performance management system.
* Develops an orientation program.

*d. Administration*

* Manages the Society's administrative functions (e.g., facilities, insurance) and oversees the Society's administrative support services.

*3. Board/Society Liaison*

* Acts as a liaison between the Board and the Society by carrying out the following activities:
* Ensures the Board's policies are carried out.
* Responsible for the communication flow between the Board and staff.
* Refers sensitive issues, particularly with respect to contentious labour relations matters or those that require clarification of policy issues, to appropriate Board committees for direction.
* Participates on Board committees where relevant and attends the monthly Board meeting.

*4. Acts as a resource person with respect to funding agencies.*

* Identifies and responds to funding opportunities available throughout various government funding agencies that are responsible for target groups serviced by the Society.
* Responsible for presenting the credentials of the Society to various funding agencies.

*5. Other Related Duties*

* Acts as official spokesperson for the Society on all policy issues and represents the Society on a number of related committees and support groups.

**C. Position Parameters**

*a. Education*

Requires formal management education, with a strong focus on the issues involved in managing the delivery of social services. Educational level for this position is likely to be a relevant undergraduate degree supplemented by additional course work at the graduate level, preferably in public administration.

*b. Experience*

Management experience is essential; the total years of experience to master this job would likely range from six to eight years of directly related experience. Must have background in program planning and delivery of social work programs.

**D. Competencies**

*Philosophy and Education*

Client orientation:

* Recognizing that staff need to be acknowledged for their abilities so that staff can take care of client.
* Understanding and background in dealing with clients.
* Front-line experience.
* Ability to balance needs of all clients.
* Establishing a Purposeful Direction.
* Create and give direction for the future and giving direction to the staff.
* Plan and establish goals that are progressive and consistent with the overall goals of the program and the Society.
* Ability to form, support and work as part of a team in their own program, as well as function as part of the Society's Management Team.

Liaison.

* Build a good relationship with the community through liaison. Understand the political and practical working environment.
* Develop a good working relationship with the Board.

*Interpersonal Competence*

Mentoring/Teaching:

* Teaching role for goal setting. Facilitate, be a mentor and support professional growth to those we are supervising.
* Demonstrate and use effective problem-solving/conflict management skills.

Integrity:

* Following through on commitments. Communicating honestly.
* Use principles of fairness, firmness, reliability and consistency in what you do.
* Maturity and common sense:
* Be practical. Having a sense of fairness (equitable to all over time) and steadiness (stability over time).
* Have perspective, common sense and humanity and not be reactive.

]Self-awareness:

* Recognize one's strengths and weaknesses to understand one's style and values.
* Seek ongoing feedback.

Ability to Learn:

* Willingness to learn and set goals/objectives to learn.
* Ongoing skill development.

Interpersonal Communication Skills

* Establish rapport with staff, clients and others.
* Acknowledge staff/clients as individuals with strengths and weaknesses.
* Share information. Be available and give priority when someone want to talk and feel it is important.
* Listen, remain balanced and recognize the need to understand others.
* Have non-judgemental attitude with staff and clients.
* Do not categorize, but do accept staff and client capabilities.
* Have a sense of humour

*Managerial Competence*

Technical Knowledge:

* + Knowledge of position. Technical and clinical skills of staff you are managing.
  + Knowledge and ability to run a program and make decisions.

Organizing and Priority Setting:

* + Know how to set priorities. Clear assessment of situations.
  + Organize and delegate duties/tasks.
  + Knowledge of possible outcomes and how it reflects on program and Society.

Decision-making:

* Recognize place for consensus and input. Ability to make ultimate decision and take responsibility for it.

Writing Skills:

* + Ability to write clear, positive and constructive letters and memos.
  + Ability to write clear, concise and informative proposals.

Understanding employee relations:

* + Develop tools for staff appraisals.
  + Develop and upgrade job descriptions, plans performance appraisals.
  + Understand labour relations issues in union and non-union settings.

Information Gathering Skills:

* + Ability to gather information using multiple sources such as log books and records to develop a memory and historical perspective, in order to assess issues and problems, remembering who the clients are.

Financial Management Skills:

* + Ability to prepare, present and administer a budget.
  + Ability to analyze budget variances and take appropriate action.
  + Ability to use a budget as a tool for planning and controlling.

Scheduling and Time Management:

* Recognize quality and quantity of work in scheduling and time management.
* Balancing program and management needs.
* Ability to maintain a systems perspective, e.g. balance of needs of own program's clients, staff and budget with those of the Society and the community.

**Key Interview Questions**

The following are examples of questions for describing past work accomplishment, motivational and leadership, work attitude, and interpersonal relations.

Past Work Accomplishments

1. Tell me about your best accomplishment in your last job, where did you get the idea, how did you plan it, how did you implement the plan, how did you deal with some of the major obstacles.
2. Tell me about your typical work day. For instance, what happened yesterday? I'm trying to find out some nitty gritty details of your day-to-day work period. That is, from the time you come into the office until the time you go home.

Motivational and Leadership Skills

Tell me about the last time you faced a situation where an employee was not performing.

Describe the situation to me and how you dealt with it. What did you say to the individual?

What did the individual say and what are some of the things that occured.

Tell me about the most emotional or most difficult situation that you've had.

Work Attitude

1. Tell me about the hardest job you've ever had in the last couple of years.
2. Give me an example of some of the jobs you found easiest.

Interpersonal Relations

* Tell me about the co-workers you like least.
* Describe the co-workers you like least.
* Tell me about the co-workers you like most.
* Describe the co-workers you like most.

# References

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