Education and Culture DG
Lifelong Learning Programme

creative blended mentoring for cultural managers

NOTES ON COMPETENCIES, ATTRIBUTES, SKILLS AND KNOWLEDGE[1]

This working document was produced to support partners during the research survey in what concerned the definition of the concepts of attributes, skills and competences. It draws on a number of existing documents from different sectors where best practice was observed. It is intended to give an overview of process rather than describe inappropriate detail.

Note: There is a whole sophisticated 'science' of Knowledge, Skills and Competence analysis contained within the broad title of 'talent Management' this is not to be confused with the performing arts but with a psychological/behavioural approach to human resources management and is sometimes know as [HCM]Human Capital Management) **. Information on this can be found at - http://en.wikipedia.org/wiki/Talent_management or commercially at www.talentmanagement.co.uk**

Knowledge, Skills and Competence according to the European Qualifications Framework (EQF)

Source: European Qualifications Framework http://ec.europa.eu/eqf/home_en.htm

In the EQF a learning outcome is defined as a statement of what a learner knows, understands and is able to do on completion of a learning process.

Learning outcomes are specified in three categories – as knowledge, skills and competence. This signals that qualifications – in different combinations – capture a broad scope of learning outcomes, including theoretical knowledge, practical and technical skills, and social competences where the ability to work with others will be crucial.

"Knowledge" means the outcome of the assimilation of information through learning. Knowledge is the body of facts, principles, theories and practices that is related to a field of work or study. In the context of the European Qualifications Framework, knowledge is described as theoretical and/or factual.

"Skills" means the ability to apply knowledge and use know-how to complete tasks and solve problems. In the context of the European Qualifications Framework, skills are described as cognitive (involving the use of logical, intuitive and creative thinking) or practical (involving manual dexterity and the use of methods, materials, tools and instruments).

"Competence" means the proven ability to use knowledge, skills and personal, social and/ or methodological abilities, in work or study situations and in professional and personal development. In the context of the European Qualifications Framework, competence is described in terms of responsibility and autonomy.

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Note: there is often confusion between *skills* and *competencies* which is understandable as they are related. The key difference as described above is the idea of responsibility and autonomy [competence] rather than just applying a learnt process. The other relationship between the two is that by applying skills in a number of contexts the individual then gains the ability to reshape the skill though reflection and therefore develop a competency. For example if someone has learnt the skill of audience development [marketing] in one organisation they will have learnt how that organisation does it , however if they have experience of how a number of arts organisations do this task or they have been formally taught they could be said to be competent as they will have learnt to apply a process to a number of contexts.

Note: the text below and the examples given go further than the EQF and include attributes

The Competency Model

Source: This section draws heavily on **the** Saskatchewan Crop Insurance Company (no date) Competency Based Approach to Staffing. Available online at: http://www.saskcropinsurance.com/Default.aspx?DN=7df3877c-5b34-4fe1-ba46-1e7186af8b12

Competencies predict effective performance, result in valid selection criteria, recognize the transferability of employees' skills and are flexible to meet the changing needs of future requirements. Furthermore, the competency model covers all aspects of what it takes to be successful in a job by examining not only knowledge and skills required but the personal attributes required as well.

A competency can be defined **as the personal attributes, skills and knowledge that are critical to being an effective, successful performer in a given job.**

NOTE: this should not be confused with leaning outcomes from academic or training programmes.

The **competency model** is comprised of personal attributes, skills and knowledge.

1. **Personal attributes** are the underlying characteristics that are deep and enduring parts of an individual expressed most of the time. They are one's personal style or personal effectiveness such as feelings, attitudes, habits

The model shows the three competency areas interlinking. Knowledge and personal attributes support the skills. The person who is effectively performing a skill on the job is at the same time using the relevant knowledge and personal attributes required.

and traits.

2. **Skills** can be observed. They are acquired through practice and experience. Certain personal attributes and knowledge are required to support a skill in order for it to be effectively performed.

3. **Knowledge** is the baseline of information that allows a person to perform from an informed perspective. This information consists of theories, facts and principles. This information may be acquired through formal or informal learning and experiences.

Competency Definition:

Competency-based human resources approaches are grounded in the notion that competencies (i.e. the knowledge, skills, abilities and personal attributes that a person brings to the job) are what drive performance. Competencies can be likened to a book. Only a small percentage of the information is visible and on the cover; the majority of the relevant information lies between the covers and can be complex to understand at times.

Skills and knowledge are most easily identifiable and can be learned on the job; however, as the job gets more complex, other competencies become primary differentiators between candidates.

Competencies related to a candidate's personal attributes are hidden and are difficult to identify. These are the attitudes, values, self-image, traits and motives that cannot be learned, but must be selected. This brings the old adage to mind, that you can't judge a book by its cover.

Competencies can be thought of as "on the cover" and "beneath the cover". The competencies "on the cover", are those that are most easily observed: technical knowledge and skills. Many organizations focus on the technical competencies when selecting or developing employees, because they are most visible and easily assessed. However cultural organisations because they require considerable dedication and commitment from employees often look deeper.

Independent research, however, shows that while knowledge and skill are essential to the job, it is the "beneath the cover" competencies (personal attributes) that differentiate between average and superior performance. Competency-based approaches therefore, focus on identifying and developing both types of competencies that will produce better results.

The following describes the usual process in establishing a competency based human resource management system and the links that are established in human resources with a competency based approach. It is noted that smaller cultural organisations may not have a human resources department and that the general manager will undertake the main responsibilities for employment.

Competency Dictionary

A competency-based approach begins with the development of a "competency profile" that defines the behaviours required for successful performance or that differentiate superior from average performance in a job. The competency profile then forms the basis of human resources system tools and processes. This is for the valuation of individual performance the "profile" is the agenda document on which to undertake this process and assess performance management.

Performance Management

Conducting assessments – the competencies can be used to assist supervisors and managers to appropriately assess employees against clearly defined performance expectations. The competencies are easily understood by employees, that this is the level of performance expected, and is not seen as a subjective process because all employees in the same occupation and pay band level are assessed against the same criteria.

Providing Feedback – acknowledging when an employee has done well and met the performance expectations as well as identifying where there are gaps (differences between assessment results and required competencies for the job). This provides an opportunity for the supervisor/manager to provide feedback to the employee on their strengths and weaknesses. It will usually then leads to developing either a learning or development plan, depending upon the level of the employee.

Learning and Development

The purpose of developing the learning and development plans is to address competency gaps identified during the assessment process. Learning plans which address deficiencies in the employee's performance can include formal, on-the-job training, coaching and mentoring types of learning activities.

The introduction of competencies will require a complete review of current learning programs such as orientation, management and supervisory training, et cetera to ensure that we are focusing our learning activities in the right areas. In addition, there is still the need for follow-up in the workplace to ensure that the employee has transferred the learning into the workplace.

Career/Personal Development

Employees can use the competency based profiles to conduct a self-evaluation to determine their strengths and weaknesses along with the feedback received from their supervisor/manager to identify and plan their career aspirations and reviewing other competency requirements (e.g. for other positions). As part of a formalized process, the manager/supervisor would interview employees during the performance feedback to determine their career goals and plans. This information would then be recorded on the performance review report and an inventory developed to share with managers as another tool to select staff for short-term projects, assignments, et cetera.

Recruiting

In the past, organizations normally hired for knowledge and experience and unfortunately fired for personal suitability. When using competencies to staff, we carefully describe those characteristics and behaviours that are impossible to learn on the job or on a formal course. Either you have the desirable characteristics or you don't. A person's attitude is almost impossible to change. In using

competencies, we take a more balanced approach when hiring. We look at the person in their entirety in terms of knowledge, experience, skills, abilities and personal suitability.

To begin with, a set of core competencies is defined. This is the root or core of what the organization requires in an effective employee and describes those specific behaviours and characteristics required to be successful on the job. Additional competencies are then described to recognize the unique differences between positions which can be added to the core competencies to help further define the desired qualifications when recruiting.

The identification of what makes a person successful and effective in a role changes the method of recruitment and the types of people recruited to a position. Traditional methods of recruitment (education, experiential and knowledge based) are replaced with recruitment methods that assess valid predictions of success on the job. This type of interviewing technique is known as behavioural based interviewing**. This technique allows an employer to explore with the candidate how they actually performed in the past rather than how they think they would perform.**

What is a Core Competency?

A **core competency** is made up of three elements: the **knowledge**, **abilities/skills** and **personal attributes** which are critical to performing a job effectively. This approach to staffing seeks to identify what blend of personal attributes, skills and knowledge makes a person successful or effective in a specific position, versus setting artificial education and experience based standards.

1. The **knowledge** forms the baseline of information acquired through work and life experiences, learning situations and formal education, which enables an individual to perform from an informed perspective. While knowledge is measurable, it is not a reliable predictor of effectiveness or success in a position.

e.g. knowledge of the VIA ticketing system (a particular ticketing system for large arts festivals) is an advantage for a candidate to the position of Box Office Manager of the Edinburgh International Book Festival.*

2. The **abilities and skills** are needed for effective performance. These are acquired through practice and experience and are demonstrable and measurable.

e.g. an applicant to the position of General Manager at the National Youth Orchestra of Ireland must have a proven ability of financial management.*

3. The **personal attributes** are underlying characteristics which are deep and enduring parts of an individual expressed most of the time. They are one's personal style or personal effectiveness, such as feelings, attitudes, habits and traits.

e.g. a candidate to the post of Education Officer at the Norden Farm Centre for the Arts must have an interest in working with young people.*

A **core competency** distinguishes what a "new recruit" must bring to the job and what a "new recruit" can learn on the job. It predicts effective performance and results in more valid selection criteria. Core Competencies recognize the transferability of knowledge, personal attributes, skills/abilities and reduces artificial barriers in the hiring process.

The personal foundations/attributes, skills and knowledge that are critical to being an effective, successful performer in a given position.

Note: These competencies MUST be measurable, observable and performance specific.

What a Core Competency is:

- ✓ Any element that is critical to successful, effective job performance
- ✓ A more accurate predictor of future success because it is determined by current successful and full performers
- ✓ Measurable, observable and performance specific
- ✓ Related to the job
- ✓ Consistent for similar jobs
- ✓ Valid
- ✓ Objective

***The Selection Process in the UK**: As part of the selection process, firstly a "long-list" is created , this is a list of possible candidates and then a "short list" is created to interview. To create this "short-list" a grid of skills, competences and experience is made. The information is taken from the CV and the application form. There maybe two sections to this grid, the skills, competencies and knowledge areas that are required and those that are desirable. A potential candidate that has all of the required and desirable will be in a stronger position. See example below.

In both the application form and the interview the candidate will be asked to give an account of where they have used knowledge, a skill or a competency essentially to provide evidence. This can also be verified through references.

Therefore if a candidate says they have used or have knowledge of the VIA ticketing system [see above] this may be tested practically or if they say they have 'good communication skills' they will be asked to provide an account of a process or incident that illustrates this. See behavioural based interviewing above.

A simple example of a form follows, where eight skills, competences or knowledge are required. Candidates are marked from 1-5 . For a senior post the number of criteria for skills, competences or knowledge would be much longer. Criteria 2 is Desirable the others Essential.
NOTE: This is a simplified version of that used at Goldsmiths

SHORTLISTING FORM

Department: Central Administration

Post Title: Administrator

SHORTLISTING CRITERIA

1. Administrative experience
2. Administrative experience with Creative Artists [desirable]
3. Experience of Excel Book Keeping
4. Department/project team management
5. Cross departmental liaison
6. Experience of managing staff records
7. Familiarity with Agresso and Oracle [computer systems]
8. Experience of taking minutes in meetings

Marked 1-5

Ref	Name of Candidate	1	2	3	4	5	6	7	8	Reasons for short-listing / rejection
1	W. Smith	4	3	3	3	3	3	3	4	Call for interview
2	E. Brown	1	1	2	2	3	1			Not all areas covered
3	L. Pink	1	2	1	1	1	2			Not all areas covered
4	J. Blue	4	4	4	4	3	4	4	4	Call for interview

Royal Exchange Theatre

Two Examples

Source: Job descriptions retrieved from the organisations websites during March 2012

NOTE: these examples do not include specific entrepreneurial attributes

Example 1. An example of a job description for a higher level post, a MARKETING & COMMUNICATIONS DIRECTOR. There are six documents presented on the website in relation to this post Full Job Advert, Job Description & Person Specification, Terms & Conditions, Application Form, Additional Information, and Equal Opportunities Form.

The job description and person specification is extensive, please see below. Note that in the person specification there is a mixture of skills, competences and knowledge.

Note: Here the post is based on Leadership and Marketing as well as strategic planning so the candidate could come from another sector, not just the arts.

ROYAL EXCHANGE THEATRE
JOB DESCRIPTION & PERSON SPECIFICATION

JOB TITLE: **MARKETING & COMMUNICATIONS DIRECTOR**
Department: **Marketing**
Responsible to: Executive Director
Responsible for: Head of Marketing, Press & Communications Manager, Design & Print Manager, Box Office Manager, Friends Organiser

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JOB DESCRIPTION
JOB CONTEXT
The Marketing Department plays an essential role both in selling tickets to the many performances and events at the Royal Exchange, and also in promoting the broader activities of the Company and its profile. This post will make a vital contribution to achieving these goals.
JOB SUMMARY

The overall purpose of the role is to devise, plan and implement marketing, PR and communication strategies that develop audiences, maximise sales and maintain a strong brand profile which involves: The role will lead on the development and execution of the Royal Exchange Theatre Company's (RET) marketing and communications strategies, support the Company's business plan and work closely with Senior Management colleagues across the Company.
The post-holder will manage effectively the marketing, sales and communications team, with line management responsibility for five members of staff: Head of Marketing, Press and Communications Manager, Design & Print Manager, Box Office Manager and Friends Organiser.
It should be noted that, in addition to the primary responsibilities and tasks listed below, there may also be the need to carry out other duties in order to meet the demands of the department. The post-holder will therefore need adopt a flexible approach to work.

DUTIES AND RESPONSIBILITIES

Duties and responsibilities of post-holder

Principal responsibilities

1. **Strategic Planning**

- To provide strategic direction to the marketing department through the development of an annual marketing and communication strategy for the Company and to oversee its implementation.
- To ensure the effective development and execution of the Company's market research and data analysis programme.

2. **Brand image, development and profile**

- To act as 'brand director' ensuring consistent use of RET brand guidelines in all marketing communications material across the Company.
- To take final responsibility for image and content of RET marketing and communication materials.

3. **Sales**

- To maximise sales across all strands of earned income generation to meet annual targets through overseeing effective marketing and communication campaigns and efficient customer facing sales operations. Income streams include tickets, programmes, craft shop and other merchandise.
- To support the Company's catering operators to maximise income earning opportunities through effective marketing campaign support and the development of cross selling initiatives.

4. **Management**

- To effectively line manage five marketing personnel, providing support and guidance through weekly 1-2-1 meetings and Annual appraisals.
- To act as communications link between the artistic team and the marketing team at a senior level.
- To contribute fully to the development of Company business and policies, in particular in relation to customer service, through RET senior management team (SHODs).

Principal tasks

Strategy

1. To create and oversee the execution of an annual marketing strategy for all the theatre's activities and brand development.
2. To work with the Head of Marketing and Marketing Officer – Digital & Systems to develop and execute an annual digital marketing activity plan.

3. To work with the Executive Director and Press and Communications Manager on the development and execution of an annual strategy and project communications plans including key stakeholder communications.
4. To create a detailed marketing budget ensuring all key activities have sufficient funds allocated. To control this budget in close liaison with the Finance Director.
5. To develop and implement an audience research framework to maximise ticket income, evaluate and develop customer experience, and develop audiences. As part of this to oversee the development and use of the Tessitura system as a key tool for sales, communication, data collecting and data analysis

Brand

6. To work closely with the Design & Print Manager to ensure brand standards are consistently applied throughout all marketing collateral.
7. To work closely with the Design & Print Manager to ensure all marketing material is produced on-time and on budget, taking specific responsibility for the overall impact of material in terms of design and copy.

Sales

8. To liaise closely with the Head of Marketing to ensure all show campaigns are executed on time and on budget.
9. To monitor ticket sales on a weekly basis and ensure that income targets are met, variances are identified early and that corrective steps are taken to reach pre-set targets.
10. To work with the Box Office Manager to ensure efficient and effective allocation of box office labour budgets, and to liaise with the Box Office Manager on call accreditation standards.
11. To assist the Head of Marketing in the execution of main theatre show campaigns as necessary.

Management

12. To ensure the work of the marketing team is effectively communicated to all senior management personnel within the company and that appropriate decision making forums are developed and are effective.
13. To manage the performance of all directly managed personnel including carrying out weekly 1-2-1's, and annual appraisals, and to ensure the Head of Marketing and Box office Manager also manage the performance of their directly managed personnel similarly
14. To oversee the work of the Friends Organiser to ensure membership levels are maintained and increased. To ensure the range of offers available to Friends is relevant and attractive.

Other Responsibilities

15. To act as an advocate for the Company with key stakeholders. This includes not only performing arts venues but the wider cultural community within the region and also key tourism partners.
16. To ensure the appropriate marketing of Royal Exchange productions or events outside the venue
17. To oversee the customer comment policy including responding directly to customers.
18. Work with all appropriate senior colleagues to review and implement appropriate pricing policies for all shows.
19. To carry out all tasks in accordance with best practice and organisational action plans in respect of diversity and disability equality
20. To carry out any additional activity as required by the Executive Director as business needs dictate.

<u>Duties and responsibilities of all members of staff</u>

To be aware of the work of other departments in the achievement of the Royal Exchange Theatre's aims and to take an active part in communicating and co-operating with other staff and departments
To assist as appropriate with projects and events initiated or managed by other departments (including but not limited to education projects and fund-raising events.)
To work in accordance with the Equality and Diversity policy of the Royal Exchange Theatre and to participate in the achievement of the theatre's Diversity action plan.

To be aware of, and comply with, rules and legislation pertaining to Health and Safety at work and to abide by the procedures as set out in the Health and Safety policy
To abide by other guidelines, procedures and policies provided by the company
To take part in such working groups and committees as might from time to time be required for the fulfilment of departmental or company aims
February 2012

Note
This job description will be reviewed on an annual basis and updated as appropriate.

PERSON SPECIFICATION

Candidates should demonstrate the following through their application and at interview (where appropriate):

Essential

- Proven experience of successfully inspiring and managing a team
- Demonstrable experience of managing and profiling a brand and ensuring that activities across an organisation cohesively contribute to enhanced brand value
- Strong strategic approach to marketing and communications including demonstrable experience of developing and implementing strategies for marketing / sales / communications and of evaluating their progress and impact
- Strong business and commercial acumen
- Experience of data analysis and its application in business planning, audience development strategies and brand management
- Knowledge of pricing, consumer behaviour and yield management
- Demonstrable negotiation, communication and influencing skills and experience, with the ability to develop positive successful working relationships with internal colleagues and external stakeholders and partners
- An excellent understanding of current marketing practice and current thinking in audience development
- Knowledge of market research techniques and experience of co-ordinating research projects
- Good knowledge and understanding of CRM
- Up to date knowledge and experience of digital developments in marketing
- An good understanding of the diversity agenda and issues relevant to the delivery of our programme and services
- A high level of self -motivation
- Creative thinker with a positive attitude
- Resilient with the ability to cope under pressure
- A passion for arts and culture

Desirable

- Experience of working in the arts and culture sector
- Knowledge of ticketing systems

- **Example 2.** In this example at a much lower level there are fewer elements to the person specification and the role does not manage anybody.

JOB DESCRIPTION

TITLE Marketing Manager, Leeds Grand Theatre & Opera House
SALARY £22,665
POST(S) TO WHICH DIRECTLY RESPONSIBLE Head of Communications
POST(S) FOR WHICH DIRECTLY RESPONSIBLE None
PURPOSE OF JOB
To promote Leeds Grand Theatre through the creation and management of effective marketing campaigns. To maximise audiences and revenue at the Grand Theatre through effective audience and business development and pricing strategies developed in conjunction with the Head of Communications, General Manager and Business Development Manager.

RESPONSIBILITIES

- To create and manage inventive and effective campaigns for all performances at Leeds Grand Theatre, maximising the impact of the budget and using both traditional and new methods of communicating with audiences
- Together with the PR Manager to raise the profile of Leeds Grand Theatre locally and regionally through targeted press campaigns and the use of social media to drive awareness
- To build strong relationships with audiences in order to increase loyalty and drive attendance
- To liaise and build excellent relationships with visiting companies and promoters
- To build and maintain cost effective relationships with external designers, printers and agencies.
- In consultation with the Head of Communications, to monitor and manage the marketing budgets for Leeds Grand Theatre
- To work closely with the Box Office Manager and ensure strong communication between the two areas
- To work as part of the wider Company marketing team to ensure that all goals are achieved
- To ensure that all FOH displays and leaflets are up to date
- To work with the Learning Manager to publicise events and raise awareness of projects and opportunities
- To work with the Business Development Manager to publicise events and facilities
- To attend press nights and functions as required
- Carry out any other duties commensurate with the post

PERSON SPECIFICATION

Detailed below are the skills, experience and knowledge that applicants are required to demonstrate in applying for the post. The 'Essential Requirements' indicate the minimum requirements and applicants lacking these attributes will not be considered for the post. The points detailed under 'Desirable Requirements' are additional attributes to enable the applicant to perform the position more effectively or with little or no training. They are not essential, but may be used to distinguish between acceptable candidates.

ESSENTIAL

- Significant and substantial experience of creating and implementing inventive and marketing campaigns both on and off line
- Proven track record in meeting sales targets through effective campaigns
- Experience of managing budgets
- Excellent communication skills
- Excellent interpersonal skills
- Excellent administrative and organisational skills demonstrating accuracy and attention to detail
- Ability to take initiative and make informed decisions as well as work collaboratively as part of a team
- Excellent IT skills, specifically Microsoft Word and Excel

DESIRABLE*

- Knowledge and understanding of the cultural offer in Leeds
- Experience of Audience View ticketing system
- Experience of working in a theatre or arts setting

*Note: for most posts the competition will be so great that all candidates will have the 'Desirable' specification

Goldsmiths, University of London

Friday, 22 June 2012