

ATD: Self-Assessment

Mary Lynn McPherson

University of Maryland University College

September 24, 2016

The Association for Talent Development (ATD) has a long history of developing competency models that have had a substantial influence on defining and shaping the training and development profession (Arneson, Rothwell & Naughton, 2013, p. 43). They have developed an instrument referred to as the “ATD Competency Model” that allows training and development professionals to self-assess their competency in skills that are thought to be essential in this field. The instrument also allows professionals to identify specific action steps to gain these requisite skills (Arneson et. al., 2013, p. 43). The purpose of this paper is to report my self-assessment findings and self-determined path for further development. I will use the following levels of competency for this self-assessment:

- None, defined as having no experience or training in this area;
- Entry-level, defined as able to perform basic skills, but training is needed;
- Intermediate, defined as able to perform most skills with little or no supervision; and
- Expert, defined as able to perform all skills and supervise others in these skills.

Background

My educational background began in 1976, with an Associate of Arts degree from Anne Arundel Community College in Business and Public Administration. After working in the business and banking industry for several years, I returned to school and earned a Doctor of Pharmacy degree from the University of Maryland, School of Pharmacy in 1986. This was followed by a Master of Arts degree in Instructional Systems Development from UMBC in 2013, and if all goes according to plan, I will complete the Master’s degree in Distance Education and E-learning from UMUC in December 2016.

I have been involved in education, training, and development for my entire career. After obtaining my Doctor of Pharmacy degree, I accepted a position as a clinical pharmacist at Union Memorial Hospital in Baltimore. In this capacity, I provided education and training to home care and hospice nurses on the appropriate role of medications at the end of life. In 1990, I accepted a faculty position at the University of Maryland, where I have remained for the past 26 years. I am a Professor and Executive Director, Advanced Post-Graduate Education in Palliative Care.

During my time at the University of Maryland, I have taught extensively throughout our curriculum, and have taught at every school on campus (Graduate School, Nursing, Pharmacy, Medicine, Social Work, Law and Dentistry). My latest, and most ambitious teaching activity has been creating a new and innovative Master of Science degree in Palliative Care, plus five Graduate Certificates in Palliative care, which will be offered through the University of Maryland. This 30-credit, completely online program is available to the entire healthcare team (physicians, pharmacists, nurses, social workers, chaplains, administrators, others) and will be taught by leaders in the field. Learners will be recruited internationally; this is the first completely online Master of Science degree in palliative care that I am aware of.

I have held many leadership positions in academia (Chair of the Curriculum Committee, Vice Chair for Education, Director of Nontraditional Doctor of Pharmacy Program, Program Director Master of Science Palliative Care) and in my profession (President, American Society of Pain Educators, Trustee of the Society of Palliative Care Pharmacists; Fellow in numerous pharmacy and health care organizations). I lecture extensively on the local, state, national and international level. I have published extensively (over 125 peer-reviewed articles, 4 books, 20 book chapters, and others), and developed certification programs for healthcare providers (e.g., Certified Pain Educator credential).

My clinical expertise is in the practice of hospice and palliative care, and in ambulatory care. I participate in the care of patients with advanced illness, and primary care patients (mostly pain and diabetes).

Foundational Competencies

The ATD Competency Model is built on six foundational competencies: Business Skills, Global Mindset, Industry Knowledge, Interpersonal Skills, Personal skills and Technology Literacy (Arneson et. al., 2013, p. 44). The following is my self-assessment in these foundational competencies.

Business Skills

Skill	Self-Assessed Competency
-------	--------------------------

Analyze needs and propose solutions	Intermediate
Apply business skills	Intermediate
Drive results	Intermediate
Plan and implement assignments	Intermediate
Think strategically	Intermediate
Innovate	Expert

Building on a surprisingly useful two year degree in Business, I worked in the business world for several years before returning to school to pursue a career in Pharmacy. I was the office manager for a home heating fuel oil company, and coordinated the work flow to maximize efficiency and financial outcomes. The Nontraditional Doctor of Pharmacy program was an opportunity for pharmacists who had graduated with the Bachelor of Science degree to come back and complete 30 credits of training to earn the Doctor of Pharmacy degree (which became the entry level degree for pharmacists many years ago). I served as the Director of this program for seven years, until the need had been met in the community. In this capacity, I created and executed the budget, I did the marketing, I planned the curriculum, and served as the program administrator. I also taught several courses in this program.

In my current role as Program Director for the Master of Science in Palliative Care, I completed the needs assessment, crafted the entire proposal to the Maryland Higher Education Commission (MHEC) for this degree, sought the approval of the Board of Regents from the University System of Maryland, and MHEC. I completed extensive curricular mapping for the entire program, and am doing so for each course presently. I developed the budget, hired employees (support staff and faculty), and established our outcomes benchmarks. This experience feels like I'm starting my own little University, within a big University. I think I'm the head of Student Affairs, Academic Affairs, Marketing, Faculty Development, Curriculum Development and much more! Not only does this speak to my business acumen, it also speaks to my ability to embrace and operationalize innovative ideas. In addition to this program, I developed the first pharmacy practice residency in the world in Palliative Care over 20 years ago, and it has served as a model internationally. The last book that I wrote ("Demystifying Opioid Conversion Calculations: A Guide for Effective Dosing") went viral, which I knew it

would, because healthcare providers are terrified of drug math. Suffice it to say, I'm not afraid to go where no (wo)man has gone before. I ranked myself as expert in innovation, and intermediate (and leaning toward expert) in business skills.

I suspect closing any gap in my business skills will be largely accomplished by on the job training with the development of this Master's degree, as well as completing my own Master's degree in Distance Education (completing all the courses, including courses on the business and economics of distance education).

Global Mindset

Skill	Self-Assessed Competency
Accommodate cultural differences	Intermediate
Convey respect for different perspectives	Expert
Expand own awareness	Expert
Adapt behavior to accommodate others	Expert
Champion diversity	Intermediate
Leverage diverse contributions	Expert

I have taught and practiced in a culturally diverse population for my entire career. The University of Maryland enjoys tremendous cultural diversity in our student population at every school, including the School of Pharmacy and the other six schools on campus. I have learned valuable lessons along the way to account for cultural differences and customs. For example, I teach an elective called "Care of the Terminally Ill." Instead of teaching the students about death rituals, I have the students share the death rituals from their own ethnic group. I learned as a young faculty member, that a rainbow scale to assess the severity of pain (white = no pain; red = worst imaginable pain) is culturally insensitive in Asian cultures (where red is a good thing, not the worst imaginable pain). I have served as the residency director to Caucasian, Hispanic, Korean, Iranian, Bahamian, Japanese, Taiwanese, and African American residents. I have precepted trainees from all over the world, who have sought to spend time in my practice. I am seeking global enrollment in the Master of Science degree in Palliative Care, and I am very appreciative of my experiences to date as I move forward.

I have been invited as a Visiting Professor to many parts of the world. My favorite was serving as the keynote speaker the first year Russia participated in World Hospice Day. I don't speak a word of Russian, and most healthcare providers in Russia speak little English. I looked up every single drug I was speaking about, and the Russian translation, as well as the availability of the medication in their country. I investigated the customs of Russian people before I went on the trip so I would not be offensive in any way. It was an amazing, amazing trip. I have spoken in Milan, Italy, Buenos Aires, Argentina, Montreal and Toronto, Canada and more.

I feel that I have made great strides in championing and leveraging diverse contributions in that I am a great fan of interprofessional education (and I mean more than just different disciplines). I have received many grants for my work in this area, and find it quite fulfilling.

I do not think someone can ever become an expert across the board in Global Mindset. I will continue to have heightened awareness of cultural differences among my learners and colleagues, and try to grow from the experience.

Industry Knowledge

Skill	Self-Assessed Competency
Maintain own professional knowledge	Expert
Keep abreast of industry changes and trends	Expert
Build industry sector knowledge	Expert

When I consider industry knowledge, I believe this speaks to both my clinical competence, and my competence as an educator. Granted, I've been at this a while, so I would HOPE that I had achieved expertise at this point! I have achieved many credentials including Board Certified Pharmacotherapy Specialist, Certified Diabetes Educator, Certified Pain Educator, and others. I am a Fellow of numerous pharmacy and professional organizations. Thanks to my hands on practice, and all the teaching I do on my campus and worldwide in my profession, I have had to remain current in the therapeutics of caring for people with serious illness. I anticipate that, while I think I am an expert in this field, my expertise will continue to grow as I develop the clinical courses in the new Master of Science program I'm developing. I

will reach out to other content experts to assure that I am providing the very best, current content that I can provide.

Similarly, I take my teaching (education, training and development) very seriously. I am passionate not only about caring for patients with serious illness, but about teaching itself. I have long sought best practices in education. Completing almost two master's degree related to teaching has helped me achieved a level of expertise that I find personally very fulfilling. This past summer I took an online course on "Quality Matters," a topic that relates to assuring the highest quality possible in online education. To continue my development in this area, I am working closely with the Graduate School at the University of Maryland Baltimore to assure the best possible online product that I can provide. I have received multiple awards for teaching, including the prestigious "Robert Chalmers Excellence in Pharmaceutical Education" award, given to the best pharmacy educator in the country!

Interpersonal skills

Skill	Self-Assessed Competency
Build trust	Intermediate
Communicate effectively	Expert
Influence stakeholders	Expert
Network and partner	Expert
Demonstrate emotional intelligence	Intermediate

Trust is a hard one – I am eminently trustworthy, but I don't trust others that easily. This probably explains why I get a little nervous about doing group work – you have to trust your partners. I have embarked on self-development in this area by following suggestions gleaned from the Leadership course in the UMUC Masters in Distance Education that I completed recently (forming, storming, norming, performing). But, just because I sometimes feel uncomfortable trusting others, I want others to feel they can trust me.

I think my ability to communicate, and to different levels of understanding (often simultaneously) is one of my greatest strengths. I am a straight-shooter (which often gets me into trouble, I don't beat around the bush), and a clear communicator. I aim not to offend, and

to be diplomatic, but I am always clear. I learned a useful trick from a Chairman at my school. After having a conversation on something a few years ago, he summarized the meeting by saying “Let me be clear on my understanding of this conversation...you’ll do A, B, C by the end of the month, and I’ll do X, Y, Z by the middle of next month.” And he looked me dead in the eye, so I knew he was serious, and that he would remember this. Consequently, so did I. I have used that technique many times with good effect.

I LOVE influencing stakeholders; as a matter of fact I am relentless. I believe this skill ties in with the ability to network and partner with others. The old adage “it’s not what you know, it’s who you know” is often true. Networking and building relationships is critically important in advancing one’s chosen field.

Last, I would say my emotional intelligence is, at best, intermediate (maybe I’m even being too generous with that). Even though I’m a “lay it all out there” kind of person, I get my feelings hurt easily. I spend a lot of time worrying that I’ve offended someone, or that I’ve done something wrong. I have worked on this for 30 years, and made some progress, but it’s still a work in progress.

Personal Skills

Skill	Self-Assessed Competency
Demonstrate adaptability	Expert
Model personal development	Expert

Regarding adaptability, I fancy myself the Queen of a work-around. One of my favorite quotes is from Peter Diamandis’ “Peter’s Laws: The creed of the persistent and passionate mind” which reads ““No” simply means begin again at one level higher” (2016). When I was told NO in response to where I wanted to house the web site for the new master’s degree I’m working on, I took stock, did additional market research, and came back again. And again. And again, and finally got what I wanted. Peter also said “Patient is a virtue, but persistence to the point of success is a blessing” (2016). I think my passion for whatever I’m doing is hugely

beneficial – such as presenting to the Board of Regents – I think my passionate excitement is contagious.

Regarding modeling personal development, to continue learning until I die is one my core values. I am a self-determined, heutagogical learner. My mother questions why, at my age, I'm getting ANOTHER advanced degree. Because I will never be content to NOT be developing. My plan is to continue doing just that.

Technology Literacy

Skill	Self-Assessed Competency
Demonstrate awareness of technology	Intermediate
Use technology effectively	Intermediate

I am acceptably proficient in all manner of software applications (Microsoft Suite), Captivate, Camtasia, and a variety of learning management systems. I believe I do use technology **effectively**, but there is always (for everyone) room for continued development. My next venture is to get very comfortable creating podcasts, which I want to do for our new Masters in Palliative Care. I have registered for a podcasting course with Udemy, but haven't had time to get to it yet. I also purchased Storyline 2 by Articulate for our new program. I work with brilliant instructional technologists who have superior skills in technology, and I continue to learn from them every day.

Importance and Priorities for Professional Development

As part of the ATD Competency Model, it is recommended that individuals summarize their self-assessment as shown on the following table. The responses are as follows:

- 0 = Not applicable
- 1 = No need for professional development
- 2 = Some need for professional development
- 3 = Need for professional development
- 4 = Much need for professional development

Foundational Competencies		How important to your job?					What are your professional development needs?				
		0	1	2	3	4	0	1	2	3	4
1	Business skills	0	1	2	3	4	0	1	2	3	4
2	Global mindset	0	1	2	3	4	0	1	2	3	4
3	Industry knowledge	0	1	2	3	4	0	1	2	3	4
4	Interpersonal skills	0	1	2	3	4	0	1	2	3	4
5	Personal skills	0	1	2	3	4	0	1	2	3	4
6	Technology literacy	0	1	2	3	4	0	1	2	3	4

Areas of Expertise

The areas of expertise (AOE) build on the foundational competencies and represent specialized knowledge, skills, and abilities that may be appropriate for a training and development professional (Arneson, et. al., 2013, p. 44). The following table summarizes each AOE, and my self-analysis.

Area of Expertise	Self-Assessment Rating
Performance Improvement (PI) – identify the customer, conduct performance analysis, conduct cause analysis, analyze systems, gather data, incorporate customer and stakeholder needs, select solutions, manage and implement projects, build and sustain relationships, evaluate results against organizational goals, monitor change.	Intermediate
Instructional Design – conduct a needs assessment, identify appropriate learning approach, apply learning theory, collaborate with others, design a curriculum, program, or learning solution, design instructional material, analyze and select technologies, integrate technology options, develop instructional materials, evaluate learning design.	Expert
Training Delivery – manage the learning environment, prepare for training delivery, convey objectives, align learning solutions with course objectives and learner needs, establish credibility as an instructor, create a positive learning climate, deliver various learning methodologies, facilitate learning, encourage participation and build	Expert

Area of Expertise	Self-Assessment Rating
learner motivation, delivery constructive feedback, ensure learning outcomes, evaluate solutions.	
Learning Technologies – use technology effectively across the different areas of expertise, identify when and how to use technology as a training and development solutions.	Intermediate
Evaluating Learning Impact – identify customer expectations, select appropriate strategies, research design and measures, communicate and gain support for the evaluation plan, manage data collections, manage data collections, analyze and interpret data, apply learning analytics, make recommendations to aid decision-making	Intermediate
Managing Learning Programs – Establish a vision, establish strategies, implement action plans, develop and monitor the budget, manage staff, model leadership in developing people, manage others, manage and implement projects, manage external resources, ensure compliance with legal, ethical and regulatory requirements	Intermediate – Expert
Integrated Talent Management – align talent management to organizational objectives, use talent management systems, equip managers to develop their people, organize delivery of developmental resources, promote high-performance workplaces, coordinate workforce and succession planning, facilitate the career development planning process, facilitate career transitions, support engagement and retention efforts, implement individual and organizational assessments, use talent management analytics to show results and impact	Intermediate
Coaching – establish coaching agreement, establish trust and intimacy with the client, display coaching presence, demonstrate active listening, ask powerful questions, use direct communication, create awareness, design learning opportunities, develop goals and plans, manage progress and accountability, meet ethical guidelines and professional standards	Expert
Knowledge Management – advocate knowledge management, benchmark knowledge management best practices and lessons learned, encourage collaboration, facilitate social learning, establish a knowledge culture, support the development of a knowledge management infrastructure, leverage technology, manage information life cycle, design and implement knowledge management solutions, transform knowledge into learning, evaluate knowledge management success	Expert
Change Management – establish sponsorship and ownership for change, build involvement, create a contract for change, conduct diagnostic assessments, provide feedback, facilitate strategic planning for change, support the change intervention, encourage	Intermediate

Area of Expertise	Self-Assessment Rating
integration of change into organizational culture, manage consequences, evaluate change results	

Performance Improvement (PI)

I have completed performance improvement tasks from the administrative perspective, educational perspective and clinical perspective. As the Director of the Nontraditional Doctor of Pharmacy program and now Program Director of the Master of Science in Palliative Care, I have done market analyses (identified the customer), identified performance problems, and strategized solutions, with re-evaluate after implementation. I have done PI research in hospice and palliative care (root cause analysis) on medication errors and other processes than have gone awry. My fellow's research project last year was to evaluate the impact of a "flipped classroom" with my pain teaching from one year to the next, with outstanding results. I was pleased with the "Quality Matters" course I took this past summer, and it really opened my eyes to PI in distance education, but I believe I still have room to grow in this area.

Instructional Design (ISD)

I LOVE instructional design; it just makes SO much sense to me. I have a Master of Arts in ISD, and have performed ISD for 30 years. I have designed individual learning activities, areas of concentration, majors, continuing education programs, and entire curricula. This includes both the Nontraditional Doctor of Pharmacy Program and the Master of Science in Palliative Care.

Training Delivery

This is another favorite part of my career, the actual teaching. I am rabid about active learning, including Socratic questioning, gamification, reflection, and many other techniques. I am deeply committed to assuring my learning objectives drive the learning objects and content, and that the assessment strategies (formative and summative) accurately and appropriately assess the learning objectives.

Learning Technologies

You can't be awesome at everything! I use technology adequately, but I'm not an intuitive technology users. This is one area of growth that I continue to pursue. But I do surround myself with people who are phenomenal with learning technologies!

Evaluating Learner Impact

I am very interested in evaluation, including Kirkpatrick's Levels 1-4 evaluation, learner satisfaction, programmatic evaluation and so forth. I would like to learn more about how to systematically identify, collect and analyze learner analytics, particularly regarding distance education.

Managing Learning Programs

I have provided leadership in this area as the Director of our Nontraditional Doctor of Pharmacy Program, and the Master of Science in Palliative Care. Further, I served as the Vice Chair for Education for 7 years in my department (handed it over in January 2016). In this capacity I was responsible for making sure all the teaching was assigned, appropriately executive, evaluated, and improved. I mentored all the faculty in my department in teaching and developed multiple development programs for them. I also personally have served and continue to serve as a mentor to several faculty members; those who are particularly interested in teaching request me as their mentor.

Integrated Talent Management

This is one area that actually makes me a little nervous. In developing the Master of Science program in Palliative Care, I've been in search of faculty that are a triple threat: 1. Boots on the ground, solid experience in their assigned content area; 2. Excellent teaching skills; 3. Online teaching experience. I seem to only be able to find double threats (online teaching experience unlikely) so I will need to pick up the ball there. The Graduate School will give me assistance with this, but I am a little nervous about developing all these new faculty members.

Coaching

After serving as a student, resident and faculty mentor for many, many years, I am very comfortable with this role. I also coach patients in my practice to adopt lifestyle modifications to better manage their chronic illnesses. I am intimately familiar with motivational interviewing and other techniques to encourage individuals to “get to the next level” in their journey.

Knowledge Management

I am a fan of social learning; I use remind.com to send “tweets” to students in my elective 5-7 times per week highlighting main points. Years ago I developed the Baltimore Palliative Care Journal Club, which is still going strong today. I chair the Education Committee for the Hospice and Palliative Care Network of Maryland, and the Society of Palliative Care Pharmacists. I am always searching for better ways to manage my out of control electronic literature file, and could use some mentorship in that area myself.

Change Management

I think again, my role in serving as a mentor to students, residents, faculty and my patients illustrate my commitment to change management. Change is HARD for anyone; a strong support system is critically important. I ranked myself as intermediate in this area because it’s such hard work, and one strategy doesn’t work for all “motivatees.”

Areas of Expertise Priorities

ATD recommends summarizing the importance of each area of expertise (now and in the future), and how important it is to the individual to build competencies in each AOE. They provide this table using the same importance key as shown with the foundational competencies, which I have completed based on my self-analysis:

Area of Expertise (AOEs) (in alphabetical order)		Present or Future?		Importance to build your competencies in each AOE				
		Present?	Future?	0	1	2	3	4
1	Change management	√	√	0	1	2	3	4
2	Coaching	√	√	0	1	2	3	4
3	Evaluating learning impact	√	√	0	1	2	3	4
4	Instructional design	√	√	0	1	2	3	4
5	Integrated talent management	√	√	0	1	2	3	4
6	Knowledge management	√	√	0	1	2	3	4
7	Learning technologies	√	√	0	1	2	3	4
8	Managing learning programs	√	√	0	1	2	3	4
9	Performance Improvement	√	√	0	1	2	3	4
10	Training delivery	√	√	0	1	2	3	4

Action Planning

After completing this self-assessment, ATD recommends the individual develop their personalized action plan, which includes action steps, timeframe and resources. I have completed this below for both foundational and AOE competencies.

Desirable Competencies	Action Steps	Timeframe	Resources
Foundational Competencies			
Business skills	Complete MED/UMUC Complete development of Master of Science Palliative Care	Present – end of 2017 (and ongoing)	UMUC MED Program Associate Dean for Administration and Finance
Global mindset	Complete development of Master of Science Palliative Care	Present – end of 2017 (and ongoing)	Graduate School UMB guidance
Technology literacy	Learn Storyline 2 Articulate Learn to make podcast	Over next six months	Work with instructional technologists at UMB
Areas of Expertise			
Change management	Evaluate impact of new MS Palliative Care Support and develop online	Over next several years	Graduate School UMB guidance

Desirable Competencies	Action Steps	Timeframe	Resources
	faculty		
Evaluating learning impact	Develop analytics to assess success of MS Palliative Care	Over next two years	Graduate School UMB guidance
Integrated talent management	Hire, train and evaluate faculty for MS Palliative Care	Over the next year	Graduate School UMB guidance; Graduate School also has an online training program for faculty new to online learning. Complete Magna training program I purchased on online teaching.
Learning technologies	Learn Storyline 2 Articulate Learn to make podcast	Over next six months	Work with instructional technologists at UMB
Managing learning programs	Continue to gain experience on best practices in administering MS Palliative Care	Until the end of my career!	On the job training; Graduate School UMB guidance
Performance improvement	Develop analytics to assess success of MS Palliative Care	Over next two years	Graduate School UMB guidance

Conclusion

Preparing for this exercise I thought I had an excellent grasp on my areas of strength and weakness, particularly as I'm preparing on rolling out this Master of Science degree in Palliative Care. This exercise was very useful, however, in several ways. I confirmed that I have many areas of strength – my instructional design abilities, my teaching skills themselves, expertise in my field, and great passion for teaching and palliative care. I certainly know my areas of weakness, notably technology. This exercise did allay my fears somewhat about the areas in between, where I ranked myself as intermediate. I think planning out the “action steps” to gain that competence helped me more concretely see where I still need development, and by planning next steps, I am confident in my plan.

I am very excited about what the future holds. If you know anyone interested in getting a master's degree in palliative care, please send them my way!

References

Arneson, J., Rothwell, W., & Naughton, J. (2013, January). Training and development competencies redefined to create competitive advantage. *T & D*, 42-47.

Diamandis, P. (2016). Peter's Laws: The creed of the persistent and passionate mind. Retrieved September 24, 2016, from <http://www.diamandis.com/peters-laws/>