

Human Resources Management:

# Using Competency Charts and Profiles



Cultural  
Human Resources  
Council

Conseil  
des ressources humaines  
du secteur culturel

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# Introduction

## What are Competencies?

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There are many different ways of defining the term “competency” as it used in the workplace. For our purposes we will define competencies as those characteristics of an individual that underlie their successful performance or behaviour in their specific job in their particular cultural organization.

Competencies are often confused with “qualifications.” But there are two significant ways in which competencies differ from qualifications:

### First

Required competencies reflect the unique vision, goals, priorities, and capabilities of each particular cultural organization.

### Second

Competencies can be used to facilitate many human resources functions including training and development, performance assessment, job descriptions, succession planning and team building — not simply recruitment. However, they do not have to be applied in all these areas at the same time. For example, some organizations start out by first applying competency profiles in training and development. Only when employees have become familiar with the use of competencies to guide training and development activities do they introduce the profile in performance assessment.

## Background to this Guide

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There are many skills and competencies in the cultural sector that are excellent predictors of high performance — skills and competencies that cultural managers are keen to develop and nurture in their organizations. The Cultural Human Resources Council undertook a major project to identify these valued skills/competencies for a wide range of cultural jobs in mainstream cultural sub-sectors. Until this project was undertaken, there had been no detailed analysis and resulting documentation of these highly desirable attributes.

## The Cultural Competency Charts and Profiles

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The Cultural Human Resources Council has produced a series of Competency Charts and Profiles for positions throughout the cultural sector including (among others):

- Automation Technicians
- Book Publishers
- Cultural Managers
- Cultural Mentors
- General Stage Technicians
- Information Resources Management Specialists
- Music Artist Managers
- New Media Content Creators
- Production Managers (Film and Television)
- Directors and Producers of Documentary Films
- Record Label Managers

**In this guide we will look at:**

- how the Charts and Profiles are presented and formatted

**and, most importantly**

- how you can use them to improve various human resources management activities in your organization.

**IMPORTANT**

The Competency Charts and Profiles are very detailed and comprehensive —some exceed 60 pages in length. In the interests of brevity and ease of use, we display relevant excerpts from the charts and profiles in this guide — not whole pages.

However, to understand the context of the excerpts — and to refer to details that may not be reproduced in the excerpts — **it is important that you have the complete charts and profiles available for the following positions:**

- Book Publishers
- Cultural Managers
- General Stage Technicians (Stage Hands)
- New Media — Content Creator

You may choose to refer to these tools online on the Cultural Human Resources Council website — [www.culturalhrc.com](http://www.culturalhrc.com) — or print out paper copies to have readily available as you read through the guide.

# How the Charts and Profiles are Organized

## The Competency Charts

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The Chart for each position is presented as follows:

1. A series of headings that describe a major function or responsibility of the position. These are called General Areas of Competence (or GAC's) and are categorized as either:
  - Professional Competencies — specific to the position
  - General Competencies — those that are common to several different roles in the cultural sector

**Example** (from the New Media Content Creator chart):

<b>General Areas of Competence</b>	A New Media Content Creator must be able to: <b>Professional Competencies</b> A. Research — Explore Ideas B. Identify Project Objectives C. Propose a Project D. Design a Project E. Develop a Project (Produce)
	<b>General Competencies</b> K. Demonstrate Interpersonal Skills L. Demonstrate Personal Skills

2. A list of skills under each GAC that describes a range of possible (ie — depending on the actual job and organization) required skills within that GAC.

Example continued:

<b>Skills</b>	<p>A New Media Content Creator must be able to:</p> <p><b>Professional Competencies</b></p> <p><b>A. Research — Explore Ideas</b></p> <ul style="list-style-type: none"> <li>A1. Play / experiment</li> <li>A2. Stockpile ideas / discoveries</li> <li>A3. Anticipate cultural trends</li> <li>A4. Immerse oneself in a variety of cultural expressions</li> <li>A5. Research potential audience</li> <li>A6. Research subject matter</li> </ul>
	<p><b>B. Identify Project Objectives</b></p> <ul style="list-style-type: none"> <li>B1. Analyze needs</li> <li>B2. Define target audience</li> <li>B3. Determine success factors</li> <li>B4. Determine financial conditions</li> <li>B5. Assess time lines</li> </ul>
	<p><b>C. Propose a Project</b></p> <ul style="list-style-type: none"> <li>C1. Develop a proposal</li> <li>C2. Perform competitive analysis</li> <li>C3. Identify deal breakers</li> <li>C4. Utilize internal/external expertise to prepare / present proposal</li> <li>C5. Prepare a draft budget proposal</li> </ul>
	<p><b>D. Design a Project</b></p>
	<p><b>E. Develop a Project (Produce)</b></p>
	<p><b>General Competencies</b></p> <p><b>K. Demonstrate Interpersonal Skills</b></p> <ul style="list-style-type: none"> <li>K1. Demonstrate teamwork skills</li> <li>K2. Work with other disciplines</li> <li>K3. Manage egos</li> <li>K4. Demonstrate listening skills</li> <li>K5. Demonstrate flexibility</li> <li>K6. Demonstrate interviewing skills</li> </ul>
	<p><b>L. Demonstrate Personal Skills</b></p> <ul style="list-style-type: none"> <li>L1. Demonstrate a passion for one’s work</li> <li>L2. Demonstrate professional integrity</li> <li>L3. Demonstrate computer literacy</li> <li>L4. Demonstrate conceptual skills</li> <li>L5. Demonstrate artistic ability</li> <li>L6. Demonstrate creativity</li> <li>L7. Demonstrate analytical skills</li> <li>L8. Demonstrate problem solving skills</li> </ul>

## The Competency Profiles

The Profile is a separate document from the Chart (although it does include the Chart content) and goes into much more detail in relation to each GAC.

It contains a further analysis of each skill into:

- **Subskills** — a breakdown of each skill into more detailed steps, each of which leads to...
- **Important Actions** — suggested actual actions that the individual may take that reflect the skill/subskill.

**Example** continued:

Skills	Subskills	Important Actions
A1. Play/ Experiment	1.1 Learn new technologies and tools	<ul style="list-style-type: none"> <li>· Consult instruction manuals</li> <li>· Research demo's and beta versions</li> <li>· Experiment with other media</li> </ul>
	1.2 Participate in role playing	<ul style="list-style-type: none"> <li>· Perform different characters</li> <li>· Act out concepts, ideas</li> </ul>
	1.3 Stream channel of conscience	<ul style="list-style-type: none"> <li>· Create doodles and sketches</li> <li>· Create on-going journals, lists and other documents</li> </ul>
A2. Stockpile ideas / discoveries	2.1 Brainstorm and share ideas	<ul style="list-style-type: none"> <li>· Participate in on-line discussion groups and message boards</li> <li>· Create and attend events with peers</li> </ul>
	2.2 Identify significant findings	<ul style="list-style-type: none"> <li>· Establish value system or merit of idea or discovery</li> </ul>
	2.3 Document ideas / discoveries	<ul style="list-style-type: none"> <li>· Produce lists</li> <li>· Produce system of organizing ideas and discoveries, i.e.: file system</li> </ul>
A3. Anticipate cultural trends	3.1 Stay current with emerging technologies	<ul style="list-style-type: none"> <li>· Monitor related media</li> <li>· Consult with peers</li> </ul>
	3.2 Analyze political/social climate	<ul style="list-style-type: none"> <li>· Stay abreast of current events</li> <li>· Research historical precedents / influences</li> </ul>

Finally, the **General Competencies** are listed next to the Important Actions to which they relate.

**Example** continued:

Skills	Important Actions	Most critical interpersonal and /or personal skills associated with the competency as a whole:
<b>A1. Play/ Experiment</b>	<ul style="list-style-type: none"> <li>· Consult instruction manuals</li> <li>· Research demo's and beta versions</li> <li>· Experiment with other media</li> </ul>	<ul style="list-style-type: none"> <li>· Demonstrate creativity (L6)</li> <li>· Demonstrate problem solving skills (L8)</li> </ul>
	<ul style="list-style-type: none"> <li>· Perform different characters</li> <li>· Act out concepts, ideas</li> </ul>	
	<ul style="list-style-type: none"> <li>· Create doodles and sketches</li> <li>· Create on-going journals, lists and other documents</li> </ul>	
<b>A2. Stockpile ideas / discoveries</b>	<ul style="list-style-type: none"> <li>· Participate in on-line discussion groups and message boards</li> <li>· Create and attend events with peers</li> </ul>	<ul style="list-style-type: none"> <li>· Establish realistic expectations (K7)</li> <li>· Work with other disciplines (K2)</li> </ul>
	<ul style="list-style-type: none"> <li>· Establish value system or merit of idea or discovery</li> </ul>	
	<ul style="list-style-type: none"> <li>· Produce lists</li> <li>· Produce system of organizing ideas and discoveries, i.e.: file system</li> </ul>	
<b>A3. Anticipate cultural trends</b>	<ul style="list-style-type: none"> <li>· Monitor related media</li> <li>· Consult with peers</li> </ul>	<ul style="list-style-type: none"> <li>· Demonstrate artistic ability (L5)</li> <li>· Stay current (L17)</li> </ul>
	<ul style="list-style-type: none"> <li>· Stay abreast of current events</li> <li>· Research historical precedents / influences</li> </ul>	

# How to Use the Charts and Profiles

As you can see from the example used, the Competency Profiles are very detailed and comprehensive. At first glance a complete Competency Profile for a particular position can be somewhat overwhelming — UNTIL you understand how to use it in your particular organization. Our aim in the remainder of this guide is to help you to streamline your use of the Charts and Profiles so that you get the maximum benefit from them in the minimum time.

As stated earlier, the Charts and Profiles can be hugely useful in helping you to think through and organize the requirements of a specific position in your organization, to ensure that you have included all the essential elements of the role.

There are several human resources functions that require a clear and complete documentation of required competencies/skills for a position, if that human resources function is to be managed effectively. These functions include, for example, recruitment, performance assessment, training and development and preparation of job descriptions.

In the remainder of this guide we will use case studies to look at four Competency Profiles and how they can be used to produce content for different human resources documents:

## Case Study 1

- writing a **job description** for a “General Stage Technician (Stage Hand)” in a theatre company.

## Case Study 2

- preparing a **list of selection criteria** for a Senior Publicist position in a book publishing company, using the “Book Publishers” Profile.

## Case Study 3

- identifying **training/development needs** for a new Manager of Program Support in a film organization, using the “Cultural Managers” Profile.

## Case Study 4

- producing a **performance assessment form** for a Web Producer in a museum, using the “New Media — Content Creator” Profile.

Following are two key points that will become clear as you read through the case studies:

- 1) **None of the Profiles are intended to be used in their entirety.** Although the job titles of several of the Profiles may be common to many cultural organizations (eg – Stage Hand, Production Managers, New Media Content Creators, etc.), the activities and specific required competencies can be very different from one organization to another. Also, some competencies may be useful for one purpose (eg — selection criteria) but not for another (ie — identifying training needs for a partly-qualified candidate).

So — each Profile has been designed to cover a very broad, comprehensive range of potential competencies for positions with that (or a similar) job title in the cultural sector.

As you will see, whenever you use the Charts and Profiles, you need to:

- review the **General Areas of Competence** and the **Skills** in the Competency Chart for the position, and select those that are relevant to the position as it actually exists in your organization, and to your specific purpose  
and then
  - turn to those Skills in the Competency Profile, and again focus only on the **Subskills** and **Important Actions** that are relevant for your purpose.
- 2) **The wording used in the Profiles to describe the Subskills and Important Actions is fairly broad and non-specific** — often too broad to be useful in a document which you want to lead to clear actions. The wording is intended only to be used as a starting point for you to produce custom-tailored statements that reflect the circumstances in your organization, the context in which the position exists, the actual content of the position itself, and the purpose for which you will use it.

These will in many cases be very different from one organization to another.

## Case Studies

The purpose of this guide is to demonstrate how the Competency Charts/Profiles can be used in various HR processes. In the interests of brevity we will not cover all competencies and skills in each of the selected Charts/Profiles — we will only cover enough to illustrate the relevant thought processes in using the Charts/Profiles to develop customized statements.

Also we will not cover the different formats for job descriptions, performance management forms, selection criteria, etc. into which these statements could be incorporated. For guidelines on suggested formats, refer to the relevant HR Tool on these subjects on the CHRC website.

In each case study we will use the term “Manager” to refer to the person who is preparing the HR document. This could be anyone in the organization who has a human resources management role — formal or informal, with or without the “HR” job title.

**As indicated on the previous page, the wording in the Profiles is intended to be used only as potential thought-starters for you to produce statements that are totally specific to your organization and your needs. Hence you will notice that many of the statements produced for each particular Case Study situation do not use the same wording as in the Profiles.**

### IMPORTANT

The case studies used here have been written for illustrative purposes only. They are fictionalized and do not reflect actual situations in specific cultural organizations.

## Case Study 1

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### Job Description

A Manager in a small theatre company had two Stage Hands and was planning to hire a third. He had no written document that clearly laid out the duties and responsibilities of a Stage Hand in his theatre. This had worked fine so far as he had closely supervised the current individuals and there had been no real need for a written outline of duties. The Stage Hands had general backstage duties and were not involved in skilled work as were the electricians and lighting technicians.

As the theatre was growing, and the Manager’s responsibilities were increasing as well, he felt it was time to add more structure to the way he managed these individuals. He wanted to prepare a job description for his Stage Hands — a description that reflected what they truly do in his theatre and that could be used as a guideline and reference point as the theatre grows.

Steps:

- 1) The Manager reviewed the **Competency Chart** for “General Stage Technicians (Stage Hands)” to identify what competencies/skills applied to his theatre and circumstances.
- 2) He considered the General Areas of Competency and ticked the Skills within each one that should be addressed in his job description. (Note: As in the previous case studies, the skills he selects may be different from those in another theatre, depending on the particular range of responsibilities of the stage hands).

<p><b>A. Load In / Load Out Production Elements</b></p> <ul style="list-style-type: none"> <li>✓ 1. Direct truck docking</li> <li>✓ 2. Load/unload trucks</li> </ul>	<p><b>E. Assemble / Disassemble Audio, Visual and Sound Elements</b></p> <ul style="list-style-type: none"> <li>1. Set up and strike speakers</li> <li>2. Set up and strike consoles</li> <li>3. ...</li> <li>4. ...</li> </ul>
<p><b>B. Assemble / Disassemble Production Elements</b></p> <ul style="list-style-type: none"> <li>✓ 1. Interpret technical drawings and documents</li> <li>✓ 2. Set and strike scaffolding</li> <li>✓ 3. Coil and run cables, wires and ropes</li> <li>✓ 4. Distribute power</li> <li>✓ 5. Perform visual inspections</li> <li>✓ 6. Dress and mask production elements</li> </ul>	<p><b>F. Assemble / Disassemble Props Elements</b></p> <ul style="list-style-type: none"> <li>✓ 1. Position and organize props</li> <li>✓ 2. Set up and strike wardrobe and performers’ requirements</li> <li>✓ 3. Lay floor coverings</li> <li>✓ 4. Set up and strike furniture, hand props and decor</li> <li>✓ 5. Secure weapons</li> <li>✓ 6. Prepare food and beverages</li> <li>✓ 7. Set up and strike orchestra physical elements</li> <li>✓ 8. Set up and strike musical instruments/band gear</li> <li>✓ 9. ...</li> </ul>
<p><b>C. Assemble / Disassemble Carpentry Elements</b></p> <ul style="list-style-type: none"> <li>✓ 1. Set up and strike rigging elements</li> <li>✓ 2. Set up and strike soft goods and masking</li> <li>✓ 3. Set up and strike flown elements</li> <li>✓ 4. Set up and strike stairs, ramps, balconies and platforms</li> <li>✓ 5. ...</li> <li>✓ 6. ...</li> </ul>	<p><b>G. Assemble / Disassemble Special Effects</b></p> <ul style="list-style-type: none"> <li>1. Set up and strike atmospheric special effects (smoke, fog and haze)</li> <li>2. Set up and strike mechanical special effects</li> <li>3. Set up and strike live sound special effects</li> <li>4. ...</li> <li>5. ...</li> </ul>
<p><b>D. Assemble / Disassemble Lighting Elements</b></p> <ul style="list-style-type: none"> <li>1. Lay out lighting position</li> <li>2. Set up and strike dimming and control</li> </ul>	

Note in the above excerpt that the Manager has not ticked any skills in GAC’s D, E or G, as he has an electrician and an audio/visual and special effects technician to handle these activities.

- 1) He referred to the **Competency Profile** to get a further breakdown of potential Subskills and Actions that could help him to develop the details for his job description.

He found that **most of the details in the relevant parts of the Profile could be used almost as-is**, as they accurately reflected the requirements of the role in his theatre.

<b>A1. Direct truck docking</b>	1.1 Ensure a safe and clear/level loading area, confirm location and make sure site is free of hazards (snow/ice/water)	<ul style="list-style-type: none"> <li>· Clear debris</li> <li>· Place pylons</li> </ul>
	1.2 Assist driver with basic hand signals.	

- **Inspect docking and loading area before all truck arrivals to ensure it is safe and clear of debris as well as other potential hazards such as snow, ice or water. Assist driver with hand signals.**

- 2) He followed the same process for the other skills he had ticked in the Competency Chart.

The results for 2 more skill areas (ie — **B3. Coil and run cables, wires and ropes** and **F6. Prepare food and beverages**) are shown on the next page.

<b>B3. Coil and run cables, wires and ropes</b>	3.1 Select appropriate cable, wire and rope	<ul style="list-style-type: none"> <li>· Determine purpose</li> <li>· Adhere to industry standards</li> </ul>
	3.2 Determine route and location	<ul style="list-style-type: none"> <li>· Consider safety issues</li> <li>· Consider traffic patterns</li> <li>· Consider efficiency</li> </ul>
	3.3 Apply appropriate handling techniques	<ul style="list-style-type: none"> <li>· Clear debris</li> <li>· Place pylons</li> </ul>
	3.4 Dress and secure cables, wires and ropes as directed.	<ul style="list-style-type: none"> <li>· Apply proper coiling and uncoiling techniques</li> </ul>

- **Select appropriate cable, wire or rope, plan the route and final location, prepare the surrounding area as required, and adhere to proscribed safety and handling procedures.**

<b>F6. Prepare food and beverages</b>	6.1 Organize food preparation workspace	<ul style="list-style-type: none"> <li>· Organize tools and materials supplies</li> <li>· Organize fresh food and dry goods</li> </ul>
	6.2 Observe proper hygiene	<ul style="list-style-type: none"> <li>· Investigate inclusion of interns</li> <li>· Ensure safe preparation techniques</li> <li>· Apply appropriate storage</li> <li>· Apply appropriate serving techniques</li> <li>· Maintain clean work environment</li> </ul>

- **Where food/beverage is required for a production, organize and maintain the preparation workspace, tools and materials in a hygienic manner, and ensure food is fresh. Ensure that proper hygiene standards are maintained when preparing food and beverages, and in storing them between performances.**

## Case Study 2

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### List of Selection Criteria

A Manager in a book publishing company planned to hire a new Senior Publicist to replace a long-term employee who was leaving. The departing employee had risen through the ranks and there had never been a written list of competencies/skills for the position that could be used in the selection and interview process. The Manager felt that the duties of a Senior Publicist in the publishing industry had increased in complexity in recent years, and that it was time to develop a hiring guide to help ensure that they hire the right candidate with the desired skills and competencies .

### Steps:

- 1) The Manager reviewed the Competency Chart for “Book Publishers” to identify what competencies/skills applied to a Senior Publicist in her particular book publishing environment.
- 2) He considered the General Areas of Competency and ticked the Skills within each one that he wanted to be addressed in the advertising, interviewing and selection process for his organization (Note: As in the previous case study, his selection criteria for the Senior Publicist may be very different from those of a Manager in another book publisher).

<p><b>A. Define the Vision and Business Strategy</b></p> <ol style="list-style-type: none"> <li>1. Articulate a mandate and a vision</li> <li>✓ 2. Identify strengths, weaknesses, opportunities, threats</li> <li>✓ 3. Set objectives</li> <li>4. Determine a decision-making process</li> <li>5. Develop a financial strategy</li> <li>6. Develop a human resources plan</li> <li>7. Produce a business plan</li> <li>8. Present a business plan</li> <li>9. Assess performance</li> </ol>	<p><b>E. Promote Books</b></p> <ol style="list-style-type: none"> <li>✓ 1. Design sales and marketing strategy</li> <li>✓ 2. Solicit reviews</li> <li>3. Create catalogues</li> <li>✓ 4. Place excerpts</li> <li>5. Develop partnership promotions</li> <li>6. Develop and execute marketing strategies</li> <li>7. Advertise books and authors</li> <li>✓ 8. Create promotional materials</li> <li>9. Create and maintain Web site content</li> <li>10. Create sales materials</li> <li>11. Arrange industry promotional events</li> <li>✓ 12. Arrange author events</li> <li>13. Prepare authors for promotion</li> <li>14. Arrange media coverage</li> <li>15. Submit authors and titles for awards</li> </ol>
<p><b>B. Develop Books and Publishing Packages</b></p> <ol style="list-style-type: none"> <li>1. Assess proposals</li> <li>2. Coordinate manuscript submission process</li> <li>3. ...</li> <li>4. ...</li> </ol>	<p><b>F. Sell Books</b></p> <ol style="list-style-type: none"> <li>1. Determine target customer list</li> <li>2. Implement sales strategy</li> <li>3. ...</li> <li>4. ...</li> </ol>
<p><b>C. Edit Books</b></p> <ol style="list-style-type: none"> <li>1. Select book title / subtitle</li> <li>2. Create bibliographical data</li> <li>3. ...</li> <li>4. ...</li> </ol>	<p><b>G. Distribute Books</b></p> <ol style="list-style-type: none"> <li>1. Establish terms of trade</li> <li>2. Maintain inventory level</li> <li>3. ...</li> <li>4. ...</li> </ol>
<p><b>D. Produce Books</b></p> <ol style="list-style-type: none"> <li>1. Determine specifications</li> <li>2. Establish and maintain production schedules</li> <li>3. ...</li> <li>4. ...</li> <li>5. ...</li> <li>6. ...</li> <li>7. ...</li> <li>8. ...</li> <li>9. ...</li> <li>10....</li> <li>11....</li> </ol>	

Note in the above excerpt that the Manager has not ticked *any* skills in GAC's B, C, D, F or G, as these competencies/skills are not relevant to a Senior Publicist's job *in his particular company*. He wants to focus on the skills selected in **A. Define the Vision and Business Strategy** and **E. Promote Books**.

1) He then referred to the **Competency Profile** to get a further breakdown of potential Subskills and Actions that could help him to customize his selection criteria. He started with Skill **A3. Set objectives**:

<b>A3. Set objectives</b>	3.1 Set long-term strategic objectives	<ul style="list-style-type: none"> <li>· Ensure link with the organization’s mission and vision</li> <li>· Comply with the S.M.A.R.T. principle (i.e., Specific, Measurable, Achievable, Relevant and Time-based)</li> </ul>
	3.2 Set short-term strategic and operational objectives	<ul style="list-style-type: none"> <li>· Ensure link with the organization’s mission, vision and long-term objectives</li> <li>· Apply the S.M.A.R.T. principle</li> </ul>

He wants someone with experience in setting specific short/medium-term objectives, as follows:

- **Experience in setting long term strategic objectives on media campaigns for authors, and in positioning the author in terms of market exposure.**

4) He followed the same process for the other skills he had ticked in the Competency Chart.

The results for 2 more skill areas (ie — **E1. Design sales and marketing strategy** and **E2. Solicit reviews**) are shown below.

<b>E1. Design sales and marketing strategy</b>	1.1 Familiarize self with list and books and market	<ul style="list-style-type: none"> <li>· Research book bind market through primary and / or secondary sources to inform marketing plan</li> <li>· Read books</li> <li>· Discuss list and books with publisher, editorial, marketing and sales</li> <li>· Analyze past performance / comparable titles of authors / series</li> <li>· Discuss lists and books with book sellers</li> </ul>
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The Manager wanted to focus on research skills:

- **Experience in researching media options (eg — print, online, TV, radio, etc.) through primary and secondary sources to help contribute to and shape the marketing plan.**

E2. Solicit reviews	2.1 Familiarize self with book and market	<ul style="list-style-type: none"> <li>· Refer to original title marketing plan (positioning audience strategy)</li> <li>· Discuss book and market with author, editor</li> </ul>
	2.2 Write press release	<ul style="list-style-type: none"> <li>· Write and format text and graphics</li> <li>· Include author bios and reviews</li> <li>· Obtain approval (from editorial, production and marketing departments)</li> </ul>

The Manager developed the following statement relating to press releases:

- **In-depth experience of writing press releases and pitch letters for media, and soliciting input on these marketing documents from relevant departments. Follow up and track resulting exposure from reviewers and media.**

### Case Study 3

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#### Training and Development Needs

A Manager in a film festival organization is planning to promote a Program Support Coordinator to the position of Manager, Program Support. The individual has had front-line experience as a volunteer and 2 years full-time in the Coordinator role. He has had some supervisory experience but the Manager wants to identify skill gaps — that is, a list of training and development needs to bring the individual up to the required level of competence for a manager in this role.

#### Steps:

- 1) The Manager reviewed the **Competency Chart** for “Cultural Managers” to identify what management competencies/skills might be lacking in the individual that could be included in his training/development plan.
- 2) He considered the General Areas of Competency and ticked the Skills within each one that should be addressed in the training/development plan. (Note: The skills selected for attention will of course be different for different individuals, depending on their particular skill gaps and the needs of the organization).

<p><b>I. CREATE 'THE BIG PLAN'</b></p> <p><b>As LEADER, she / he must be able to :</b></p> <p><b>A. Establish Direction</b></p> <ol style="list-style-type: none"> <li>1. Analyze strengths, weaknesses, opportunities and threats</li> <li>2. Develop and review organization's mission</li> <li>3. Develop and review artistic and organizational vision</li> <li>4. Provide guidance on the development and review of governance structure and policies</li> <li>5. Establish ethical standards</li> <li>6. Secure Board approval and commitment</li> </ol>	<p><b>II. DEVELOP A HUMAN AND ORGANIZATIONAL NETWORK FOR ACHIEVING 'THE BIG PLAN'</b></p> <p><b>As LEADER, she / he must be able to:</b></p> <p><b>C. Build Relationships</b></p> <ol style="list-style-type: none"> <li>✓ 1. Develop and maintain relations with the Board</li> <li>✓ 2. Encourage and facilitate artistic development</li> <li>3. Provide orientation to new staff</li> <li>4. Promote positive relations with community</li> <li>✓ 5. Develop and maintain relationships with internal and external stakeholders</li> <li>✓ 6. Develop and maintain partnerships</li> <li>7. Develop and maintain relationships with donors</li> <li>8. Develop and maintain peer networks</li> <li>9. Lead advocacy efforts</li> <li>10. Solicit support from the private sector</li> <li>11. Solicit government support</li> <li>12. Build volunteerism for the organization</li> </ol>
<p><b>As MANAGER, she / he must be able to :</b></p> <p><b>B. Develop a Strategic Plan and Establish Budget</b></p> <ol style="list-style-type: none"> <li>✓ 1. Set objectives</li> <li>2. Identify program / project opportunities in accordance with artistic and organizational vision</li> <li>✓ 3. Prioritize program / project opportunities</li> <li>✓ 4. Establish content and production schedules</li> <li>✓ 5. Prepare human resources plan</li> <li>6. Establish and maintain succession plan</li> <li>7. Develop marketing and public relations plan</li> <li>✓ 8. Set financial objectives</li> <li>✓ 9. Establish operating budget</li> <li>10. Prepare a capital and facility needs plan</li> <li>11. ...</li> </ol>	<p><b>As MANAGER, she / he must be able to :</b></p> <p><b>D. Organize Operations and Staff</b></p> <ol style="list-style-type: none"> <li>1. Design and implement an organizational structure</li> <li>2. Prepare policies and procedures</li> <li>✓ 3. Establish financial systems</li> <li>✓ 4. Allocate funds</li> <li>✓ 5. Develop job descriptions</li> <li>✓ 6. Organize work</li> <li>7. ...</li> </ol>

5) He then referred to the **Competency Profile** to get a further breakdown of potential Subskills and Actions that could help him to customize the details in his training/development plan. He started with Skill **B1. Set objectives**.

<b>B1. Set objectives</b>	1.1 Set long-term strategic objectives	<ul style="list-style-type: none"> <li>· Ensure link with organization’s mission and vision</li> <li>· Comply with the S.M.A.R.T. principle (i.e., Specific, Measurable, Achievable, Relevant and Time-Based)</li> </ul>
	1.2 Set short-term and operational objectives	<ul style="list-style-type: none"> <li>· Ensure link with organization’s mission, vision and long-term objectives vision</li> <li>· Apply the S.M.A.R.T principle</li> </ul>

6) This individual will not be involved with setting long-term objectives but will set operational objectives.

- **Set objectives for: a) planning and implementing mentorship programs and b) determining and arranging logistics support needed for selected artists attending the film festival.**

7) He followed the same process for the other skills he had ticked in the Competency Chart.

The results for 2 more skill areas (ie — **C2. Encourage and facilitate artistic development** and **D7. Recruit staff**) are shown below.

<b>C2. Encourage and facilitate artistic development</b>	2.1 Maintain special ties with artists of the same or related fields	
	2.2 Participate in and organize artistic development activities	

The Manager wanted to focus on 2.1, to further strengthen the individual’s networking skills:

- **Develop networking skills to develop strong ties with artists and with Arts Services Organizations. Networking activities should include attending events such as films, internal programming offered for film education, etc.**

D7. Recruit staff	7.1 Determine position profile	<ul style="list-style-type: none"> <li>· Determine required expertise</li> <li>· Determine required qualifications</li> <li>· Determine personal competencies</li> </ul>
	7.2 Develop and implement recruitment strategy	<ul style="list-style-type: none"> <li>· Investigate inclusion of interns</li> </ul>

The Manager developed the following customized training need from the Subskills/Actions above, for the individual’s recruitment activities:

- **Develop specific requirements for candidates for:**
  - 1) visitor services — eg — hospitality industry background, etc.
  - 2) assistants to programmers (seasonal staff) — eg — film production or distribution background, film studies, etc.

## Case Study 4

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### Performance Assessment Form

A Manager in a museum planned to establish a performance management system for her technical staff. Among other positions, she needed to clarify job responsibilities for a Web Producer to use as a reference point and basis for annual reviews.

#### Steps:

- 1) The Manager reviewed the **Competency Chart** for “New Media Content Creator” to identify what competencies/skills applied to a Web Producer in her particular museum environment.
- 2) She considered the General Areas of Competence and ticked the Skills within each one that she wanted to be addressed in a performance review of a Web Producer in her organization (Note: Her priorities for the Web Producer may be very different from those of a Manager in another organization)

<p><b>A. Research — Explore Ideas</b></p> <ul style="list-style-type: none"> <li>A1. Play / experiment</li> <li>✓ A2. Stockpile ideas / discoveries</li> <li>✓ A3. Anticipate cultural trends</li> <li>A4. Immerse oneself in a variety of cultural expressions</li> <li>A5. Research potential audience</li> <li>✓ A6. Research subject matter</li> <li>A7. Assess potential of an idea</li> <li>A8. Analyze success / failures</li> </ul>	<ul style="list-style-type: none"> <li>D8. Experiment with concepts</li> <li>✓ D9. Address legal issues (copyright, licensing, clearances)</li> <li>✓ D10. Develop prototype</li> <li>D11. Determine functional specs</li> <li>D12. Develop detailed written script</li> <li>D13. Create treatment (design document)</li> <li>D14. Develop video/film production plan</li> </ul>
<p><b>B. Identify Project Objectives</b></p> <ul style="list-style-type: none"> <li>B1. Analyze needs</li> <li>✓ B2. Define target audience</li> <li>B3. Determine success factors</li> <li>B4. Determine financial conditions</li> <li>✓ B5. Assess time lines</li> <li>B6. Assess existing resources (HR + tools)</li> <li>B7. Assess benefits</li> </ul>	<p><b>E. Develop a Project (Produce)</b></p> <ul style="list-style-type: none"> <li>✓ E1. Utilize development environment</li> <li>✓ E2. Re-use catalogued assets / templates</li> <li>E3. Produce code</li> <li>E4. Create database</li> <li>E5. Create interface</li> <li>✓ E6. Produce text-based content</li> <li>E7. Produce illustrations</li> <li>E8. Produce images</li> <li>E9. Produce video</li> <li>E10. Build digital 3D architecture models / sets</li> <li>E11. Develop digital 3D animation</li> <li>E12. Develop traditional animation</li> <li>E13. Design lighting</li> <li>E14. Produce audio</li> <li>E15. Produce music</li> <li>E16. Produce media installations</li> <li>E17. Integrate technical and artistic components</li> <li>E18. Implement quality assurance (testing)</li> <li>E19. Establish release environment</li> <li>E20. Create support documentation</li> <li>E21. Release product</li> <li>E22. Assess / evaluate project</li> </ul>
<p><b>C. Propose a Project</b></p> <ul style="list-style-type: none"> <li>✓ C1. Develop a proposal</li> <li>C2. Perform competitive analysis</li> <li>C3. Identify deal breakers</li> <li>C4. Utilize internal/external expertise to prepare / present proposal</li> <li>✓ C5. Prepare a draft budget proposal</li> <li>C6. Identify potential funders / sponsors</li> <li>C7. Tailor proposal content</li> <li>C8. Create partnerships</li> <li>C9. Present the project</li> <li>C10. Close the deal</li> </ul>	

3) She then referred to the **Competency Profile** to get a further breakdown of potential Subskills and Actions that could help her to customize the statements in her performance review form. She started with Skill **A2. Stockpile ideas/discoveries**:

<b>A2. Stockpile ideas/discoveries</b>	2.1 Brainstorm and share ideas	<ul style="list-style-type: none"> <li>· Participate in on-line discussion groups and message boards</li> <li>· Create and attend events with peers</li> </ul>
	2.2 Identify significant findings	<ul style="list-style-type: none"> <li>· Establish value system or merit of idea or discovery</li> </ul>
	2.3 Document ideas/discoveries	<ul style="list-style-type: none"> <li>· Produce lists</li> <li>· Produce system of organizing ideas and discoveries, i.e.: file system</li> </ul>

She did not feel that it was necessary, *for her purposes*, to produce a separate statement for each of these Subskills/Actions. Two statements for this skill area would be enough to cover the points she wanted included in her performance review form:

- **Review, research and evaluate best practices in the on-line holiday offerings of other museums, and other cultural websites with events offered for holiday periods**
- **Present and discuss best practices and resulting ideas, with pros and cons, at weekly New Media Production meetings.**

4) She followed the same process for the other skills she had ticked in the Competency Chart.

The results for 2 more skill areas (ie — **B2. Define target audience** and **J2. Participate in new media events**) are shown below.

<b>B2. Define target audience</b>	2.1 Identify primary user/audience	<ul style="list-style-type: none"> <li>· ...</li> <li>· ...</li> </ul>
	2.2 Identify primary user/audience behaviour	<ul style="list-style-type: none"> <li>· Research user demographic statistics</li> <li>· Research user spending patterns</li> <li>· Research user knowledge and interests</li> <li>· Research users' accessible technology</li> </ul>

The Manager wanted to focus on 2.4 — Identifying primary user/audience behaviour — as a desired competency and developed the following statement:

- **Research current and potential web content, categorized by its likely appeal to each of the following audience groups: members, donors, teachers, students, government shareholders, children and parents.**

<b>J2. Participate in new media events</b>	2.1 Select pertinent event	<ul style="list-style-type: none"> <li>· Compile list of upcoming events</li> <li>· Consider budget</li> </ul>
	2.2 Enroll	<ul style="list-style-type: none"> <li>· Identify groups and / or opportunities</li> <li>· Establish contact (register)</li> <li>· Establish involvement (public or actor)</li> <li>· Make reservations (travel, lodging, kiosk space)</li> </ul>

The Manager developed the following customized performance criterion from the Subskills/ Actions above:

- **Identify, attend and network at a broad range of events within the new media community, focusing particularly on those relating to web development, film making, videos/DVD, blogging, pod-casting, and advertising.**

## Conclusion

The Competency Charts and Profiles can be enormously useful for providing a broad and comprehensive view of the skills needed for many positions in cultural organizations.

But as stated at the beginning of this guide, as the Profiles are intended to cover all the variations of a particular role in all cultural organizations, they can also be somewhat intimidating at first glance.

As you have seen in the case studies used in this guide, the key to using the Profiles successfully is to select and focus on only those elements that apply to your particular organization, and to the purpose for which you are using it. This will enable you to produce valuable and complete documentation of required skills for a wide range of positions and human resources management functions in your organization.

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## Steering Committee

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The partners gratefully acknowledge the contribution of the following individuals who have contributed as valued members of the Steering Committee:

- Susan Annis, Executive Director, Cultural Human Resources Council
- Bob Johnston, Executive Director, Cultural Careers Council of Ontario
- Jeanne LeSage, Director of Human Resources, Toronto International Film Festival Group
- Manon Turcotte, Project Manager, Cultural Human Resources Council

## Participants

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## Consultant

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