LEARNING FRAMEWORK GUIDE FOR TEAMS

College and University Professional Association for Human Resources

www.cupahr.org/framework

Team Action Planning

The CUPA-HR Learning Framework supports professional development planning by illustrating dynamic higher ed HR competencies and creating a foundation for discussion and measurement of those competencies. This handout is intended for teams who want to assess the competencies that are critical to team success and identify the levels of proficiency they need to achieve.

The framework is:
- Designed around HR expertise and professional competencies
- Compatible with current HR practices
- Tailored to the development of essential higher ed HR skills
- A basis for consistent higher ed HR discourse and expectations

Getting Started: First Things First

1. What are the necessary competencies for this team to succeed? Where should the team be a year from now? Three years from now?
2. What are this team's greatest competency strengths and weaknesses?
3. What proficiency levels should the team have achieved a year from now? Three years from now?

Next Step: Team Assessment

The next section will help to assess the importance of each competency to the team's effectiveness and what level should be achieved. Use the following importance scale and proficiency levels to assist in completing the assessment

Level of importance:

0 = not applicable; 1 = not important; 2 = somewhat important; 3 = important; and 4 = very important

Proficiency:

Awareness = Able to recognize the common knowledge or understanding of a competency. The individual has the level of experience acquired by fundamental training, formal education and experiential learning.

Application = Able to successfully complete tasks as requested and without assistance. On most occasions, the competency is performed independently. Occasionally, the individual initiates action or makes rudimentary improvements without being prompted.

Mastery = Able to provide guidance, troubleshoot and answer questions related to this area of expertise and the field where the skill is used.

Influence = Able to look beyond circumstances or title to spark change in actions, behavior, processes and relationships to achieve a common goal that is strengthened by trust (ex. demonstrates exemplary leadership by modeling the way, inspiring a shared vision, challenging the process, enabling others to act, and encouraging the heart).

Core (Experiential. Achieving specific higher ed HR skills from experience or learning)	Level of Importance to Team (use scale of 0-4)	Current Proficiency Level (list a proficiency)	Target Proficiency Level (list a proficiency)	Prioritize Competency Work (use 1st, 2nd, 3rd, etc.)	Time to Achieve Target Level (3 mos, 6 mos, 1 year, other)
Benefits					
Compensation					
Recruitment					
Employee/Labor Relations					
Employee Development					
HR Data, Systems and Analytics					
Risk Management, Compliance and Public Policy					
Organizational Development and Planning					
Budget and Finance					
Project Management					
Building Capabilities (Operational. Overseeing the functioning and activities of teams, departments or divisions)	**Level of Importance to Team** (use scale of 0-4)	**Current Proficiency Level** (list a proficiency)	**Target Proficiency Level** (list a proficiency)	**Prioritize Competency Work** (use 1st, 2nd, 3rd, etc.)	**Time to Achieve Target Level** (3 mos, 6 mos, 1 year, other)
Identify, Recruit and Onboard Talent					
Performance Management					
Succession Planning					
Cultural Architect and Steward					
Change Management					
HR Operations					

Engagement (Relational. A strong culture that places importance on relationships, connections and care throughout the entire institution)	Level of Importance to Team (use scale of 0-4)	Current Proficiency Level (list a proficiency)	Target Proficiency Level (list a proficiency)	Prioritize Competency Work (use 1st, 2nd, 3rd, etc.)	Time to Achieve Target Level (3 mos, 6 mos, 1 year, other)
Building Trust					
Team Building					
Self-Awareness and Accountability					
Relationship Management					
Constructive Inquiry					
Collaboration					
Ethics					
Communications					
Cultural Competence/ DEI					
Credibility					
Coaching					
Mentoring					
Strategic Leadership (Influential. Having great influence on work, direction of work and rapport)	Level of Importance to Team (use scale of 0-4)	Current Proficiency Level (list a proficiency)	Target Proficiency Level (list a proficiency)	Prioritize Competency Work (use 1st, 2nd, 3rd, etc.)	Time to Achieve Target Level (3 mos, 6 mos, 1 year, other)
Leading the Higher Ed Business Model					
Strategic Positioner					
Continuous Improvement					
Planning					
Critical Thinking					
Influence					

Final Step: Conversation Process

Inspiring staff and teams to grow is essential to any institution's success. Growth can be nurtured through meaningful conversations that go well beyond formalized performance reviews and evaluations.

Who to include: In addition to the team, who else would you involve in the discussion? Others to consider are business officers, general counsel, IT professionals, academic and faculty affairs staff, and the like. They can offer a different perspective of how the team works and which competencies to (continually) develop.

To help facilitate ongoing professional development conversations, use the following questions or identify a few additional ones that aid in encouraging a team's development:

- What are the most essential competencies this team needs to succeed?
- What are our strengths and weaknesses?
- In reviewing each team member's assessment of the team's competencies, where were the similarities? Where were there differences? What can explain the differences in assessing competencies?
- Which competencies does the team need to improve immediately?
- After completing the assessment, how do you think other institution teams would rate this team's proficiency level in essential competencies?
- How is the institution's culture getting in the way of the team's success? (ex. "this is how we've always done it.")
- What is getting in the way of enjoying what this team does best?
- How should each team member contribute to the team, the institution?
- What is the one thing I am doing that gets in the way of the team's productivity?
- What questions do you have for me?

Once this handout is completed, confirm the team feels as though they are clear on the next steps, which could include learning by experience, from others or through additional education.

Team Development Checklist

Activity	Complete (Y or N)
Review the Learning Framework — highlight key areas of interest for the team.	
Have team members complete the individual handout for self-assessment purposes.	
Schedule a time with the entire team to complete the team handout together. Have them identify overall team strengths and opportunities. Have the team share the individual strengths each person has to contribute to the overall team's success.	
Experiential • What are the key function HR areas for this team? • What blend of expertise is needed to succeed? • Make notes of the key functions and blended expertise needed.	
Operational • What are the overall institutional processes that require HR skills? • Who on the team should carry out the task/responsibility?	
Relational • How does this team collaborate with one another, other teams? • In what ways can this team enhance performance by recognizing and responding to the need to take risks, to encourage constructive criticism and inquiry, to enhance culture, and to improve accountability?	
Influential • Observe how the team learns, shares responsibilities and operates (individually and collectively), and guide them to achieve team and individual goals. • In what ways will they communicate with others across campus?	
Confirm everyone on the team understands the purpose of reviewing the Learning Framework.	
What resources are needed to accomplish individual and team competency goals? • Training • Courses • Reading Materials • Mentors • Peer Study Groups • Other?	
How will each team member own the process of using the Learning Framework for competency development?	
How will you hold each team member accountable for achieving target competency levels (individual and team)?	
Schedule team meetings to revisit competency development progress and assess next action steps.	
What type of development feedback are you providing?	
Check in with each team member to find out about their progress.	

Resources

Some other resources to help with the team's professional development journey:
- Website: Learning Framework Landing Page
- Course: Creating Your Individual Development Plan
- Course: CUPA-HR Boot Camp
- Course: Understanding Higher Education
- Essentials: Developing Leadership Competencies in Higher Education
- Knowledge Center: Diversity, Equity and Inclusion Toolkit
- Knowledge Center: Orientation/Onboarding Toolkit
- Knowledge Center: Performance Management Toolkit
- Knowledge Center: Staff Training Toolkit
- Knowledge Center: Management Training Toolkit
- DEI Maturity Index: To be attractive institutions for generations to come, institutions should be proactive — rather than reactive — in taking steps to ensure they are diverse, equitable and inclusive.

Notes