

# ADAPTING ONE OF THE TWELVE COMPETENCY MODELS TO SIMILAR UTILITY JOBS

*Utilities can adapt the models developed in this project for positions that are somewhat different in their organizations. This chapter offers a process that can be used to adapt one of the models.*

## OVERVIEW OF THIS PROCESS

To develop a competency model for a job at a water utility that is similar to one of the twelve key jobs for which a competency model was developed (Appendix A) the simplest approach is to convene a special meeting with several persons, and several managers of persons who hold this job (Resource Panel). In the first part of the meeting, the Panel is guided by a facilitator through a series of questions about the job so that the participants identify in their own language the competency requirements of the job. Participants' contributions are captured on flip chart pages. As part of this process, the Panel also identifies the information needed to prepare a Job Description.

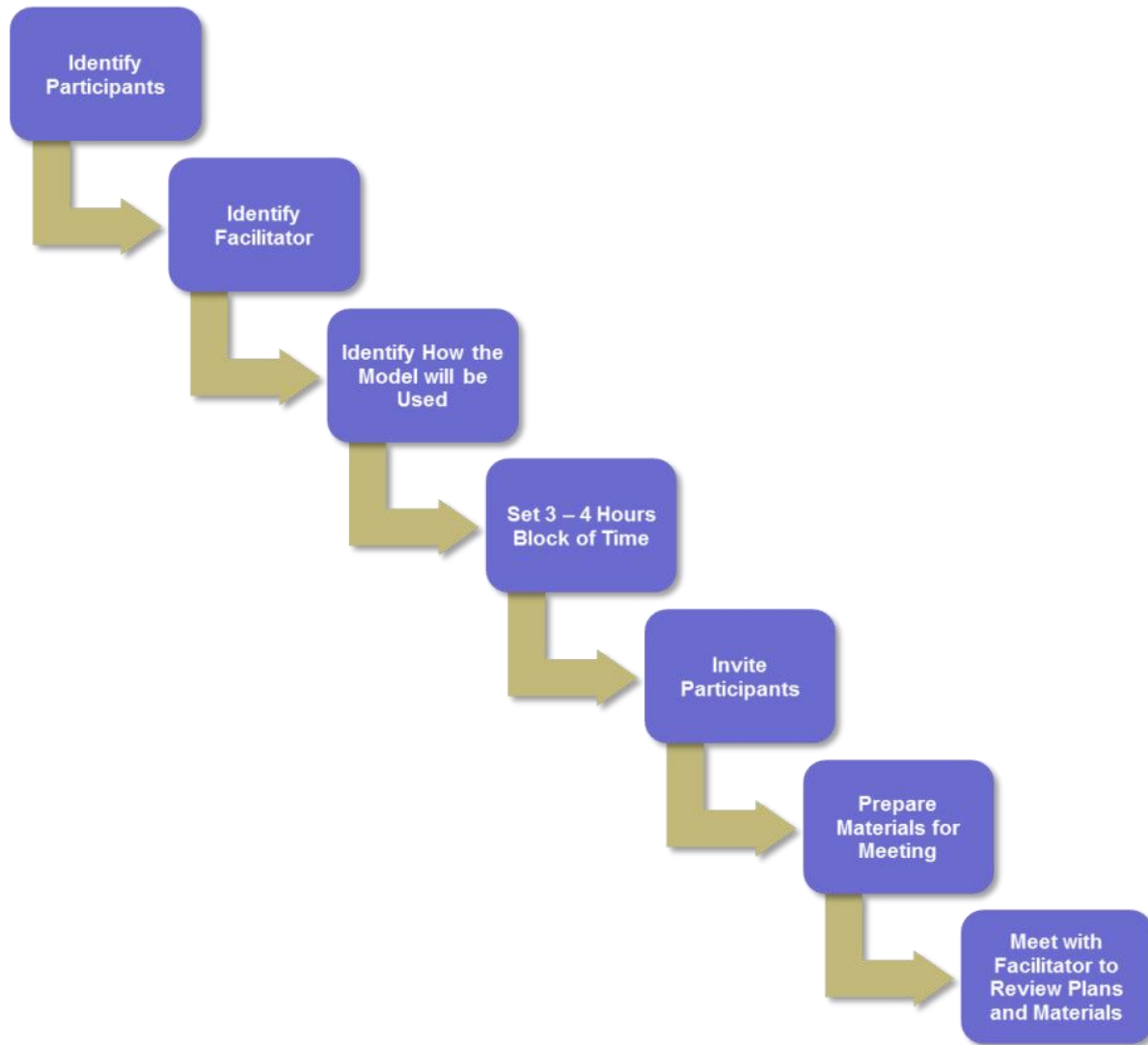
In the second part of the meeting the Panel reviews the existing competency model and identifies additions or changes that are needed to ensure that the competency model reflects the job in their organization. Someone from the Panel then uses the notes from the meeting and competency model templates (Appendix D) to prepare the adapted competency model and Job Description, if one is needed.

## PLANNING AND PREPARING FOR THE RESOURCE PANEL

Here are some key steps in planning and preparing for the Resource Panel meeting. They are also summarized in Figure 3.1

1. Identify the Resource Panel participants. You should include two to four capable people who currently hold the job and two to four capable managers of persons in the job.
2. Identify a facilitator. The facilitator could be one of the persons already identified for the panel or an HR or Learning and Development person. The facilitator should be someone with experience leading meetings.
3. Identify how the competency will be used and how this will benefit the organization. You will include this information when inviting the participants and when starting the Resource Panel meeting.
4. Schedule a 3-hour block of time and a room for the meeting.
5. Invite the Panel participants. In your email communication explain the purpose and format of the meeting.
6. Prepare materials for the meeting, including:
  - a. Flip chart(s), new markers, and masking tape for hanging flip chart pages.
  - b. Copies for each participant of the following materials:
    1. Existing Job Description, if any, for the job
    2. Competency Model that is to be adapted (available at the [Water Utility Workforce Needs Website](#))

3. Outline of Resource Panel Activities for Adapting a Competency Model
4. Competency Glossary (Appendix B and downloadable from the [Water Utility Workforce Needs Website](#) )
7. Meet with the facilitator for the meeting and review the plan and materials for the Resource Panel.



**Figure 3.1** Planning steps for the resource panel

## HOLDING THE RESOURCE PANEL

The facilitator or the project sponsor will explain the purpose of the project including why a competency model is needed and how it will be used. The facilitator then walks the Panel through each of the questions about job responsibilities, as outlined below, to capture the information needed for the development of the competency model. The facilitator writes each question at the top of a flip chart page and captures participants' ideas below the question. As flip chart pages are completed, they should be numbered and posted on walls of the meeting room so that participants can refer to the ideas, as needed.

After the Panel has completed the questions about the existing job, the facilitator leads them through a process of reviewing the existing competency model and identifying any additions and changes that are needed, based on the previous discussion of the job. The facilitator appoints a recorder to write clear and complete notes about the agreed additions and changes to the Competency Model.

If the Panel believes that additional competencies are needed, they should refer to the Competency Glossary, which includes almost all non-technical competencies that are likely to be needed and many technical competencies. If a new technical competency is needed, it should be written in a format similar to the format of other technical competencies in the Competency Glossary. Most often, this involves specifying the domain of expertise and possibly some sub-domains.

In managing the Panel, the facilitator should keep the Panel focused on tasks, ensure that everyone has a chance to weigh in on a question, and, when appropriate, ask Panel members to clarify their ideas.

At the end of the meeting the facilitator should ensure that someone commits to taking all of the meeting's flip chart notes and discussion notes to prepare an adapted competency model and a Job Description, if one is needed.

The process is outlined below.

### Collect Information Needed for a Competency Model from Resource Panel

What are the three to five most important main responsibilities for the job? (Review the main responsibilities at the end of the General Competency Model you are adapting and identify any additions or modifications.)

1. For the first main responsibility, answer each question below:
  - a. What are the most important tasks?
  - b. What technical skill and knowledge are needed?
  - c. What non-technical skills and personal characteristics are needed
2. Repeat question 2 for each additional main responsibility.
3. What are the most challenging situations that the jobholder must deal with?
4. What skills and personal characteristics are needed to deal with these challenging situations?

5. What skills, personal characteristics or behaviors distinguish outstanding performers?

### **Review and Agree on Changes to the General Competency Model That You Are Adapting**

6. Review the overall structure of the general competency model
  - a. Main competencies, divided into technical and non-technical sections
  - b. Foundational competencies (expected before entry into the job), divided into technical and non-technical sections
  - c. Competencies and behaviors leading to superior performance
  - d. Main responsibilities for the job
7. Review the technical competencies in the general competency model and compare them with the technical skill requirements that you have identified so far in the Resource Panel Session
  - a. On a copy of the general model, note any changes or deletions to any of the sections on technical competencies
  - b. Identify any technical competencies that need to be added to the general competency model
8. Compare the non-technical competencies in the general model and compare them with the non-technical skill requirements that you have identified so far in the Resource Panel Session
  - a. On a copy of the general model, note any changes, additions or deletions to any of the sections on non-technical competencies
  - b. Identify any non-technical competencies that need to be added to the general competency model. Consult the Competency Glossary to find needed non-technical competencies that are not included in the general competency model
  - c. For each non-technical competency that you plan to include in the adapted competency model, select three to eight behavioral indicators that are most appropriate for the job
  - d. If the behavioral indicators in the Competency Glossary do not fully or accurately describe how jobholders need to demonstrate the competency, consider adapting behavioral indicators or writing new ones
9. Compare the general competency model's section on superior performance with the Resource Panel's ideas about superior performance (Question 6) and identify any changes or additions you would like to make to the general model
10. Compare the main responsibilities in the last section of the general competency model with the Resource Panel's set (Question 1), and identify any changes you would like to make, when adapting the general competency model

### **Collect Information Needed for Job Description**

*Note: If time is available, complete this section as part of the Resource Panel; if not, assign this section to one or two of the managers of jobholders, to be completed as part of the follow-up activities.*

11. If an existing Job Description is available, review it and identify any needed changes or additions

If a new Job Description is needed, prepare answers these questions:

12. What is the title(s) for this job or set of jobs?
13. What is the purpose of this job? (1 sentence)
14. What is the title of the position to which this job reports?
15. What supervisory responsibility is there, if any? (number of persons supervised and their roles)
16. What decision-making responsibility is there?
17. What educational degrees or certifications, if any, are required (essential)?
18. What previous work experience, if any, is required (essential)?
19. What is the travel requirement, if any? (percentage of time)

### **Post-Resource Panel Follow-Up Activities**

- Use the notes from the Resource Panel to prepare a clean, adapted version of the general competency model
- Use notes from the Resource Panel and the Job Description template in Appendix C to prepare a Job Description
- Send the new, adapted competency model and the Job Description to panel members for review. Ask them to identify any editorial changes that may be needed
- Make any edits that are needed and distribute the revised Competency Model and Job Description to all appropriate stakeholders