

**Building Competencies for Managers and Staff of  
Coordinated School Health Programs**

## Preface

This *Building Competencies for Managers and Staff of Coordinated School Health Programs* document was developed by the National Training and Development Consortium for School Health (TDC) to better define and assess the professional development needs of state education agency (SEA), state health agency (SHA), territorial education agency (TEA) and local education agency (LEA) staff funded by the Centers for Disease Control and Prevention, Division of Adolescent and School Health (DASH). The TDC enlisted the assistance of many experienced DASH funded program managers in order to bring this document to life with meaningful and applicable results. The document's two year development process included the input of a thirteen member writing team, fourteen pilot test sites and more than 100 project staff that participated in TDC events to review, use and comment on the document.

The document was intended to be utilized by the following job groups: coordinated school health program directors in state education agencies and state health agencies; comprehensive school health education coordinators in state, territorial and local education agencies; and HIV prevention coordinators in state, territorial and local education agencies. The responsibilities and competencies have been described broadly in order to include as many of the job titles as might apply. Each section of the document may have varying degrees of application for the different job titles listed above. Each school health professional utilizing this tool should review the document and determine the relevance of each section to his/her individual job responsibilities.

The document has many uses. First, school health professionals may choose to use the document in a variety of ways: as a self assessment and/or staff assessment of professional development needs; to design job descriptions; to describe job responsibilities to others; and to develop staff mentoring programs. Second, providers of professional development for school health program professionals may utilize the document to assess professional development needs in particular responsibility areas as they design future professional development offerings. It is the hope of the authors that the document will provide an impetus for professional growth to all who use it.

# Acknowledgements

## **National Training and Development Consortium Member Organizations:**

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The content of this publication does not necessarily reflect the views or policies of the U.S. Department of Health and Human Services, or does mention or trade names, commercial products or organizations imply endorsement by the U.S. Government.

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## INTRODUCTION

### What Are Competencies?

Competencies are “clusters of related knowledge, attitudes, and skills that affect a major part of one’s job, role, or responsibility” [*The Art and Science of Competency Models*, Lucia, A.D. & Lepsinger, R. (1999)]. Competencies describe what’s needed to carry out a job or specific job responsibility; they can be improved upon through training and professional development. Most importantly, competencies can be used to focus and/or select professional development activities.

### Why Assess One’s Competencies?

The goal of this document is to provide a tool for school health professionals in state education agencies (SEAs), state health agencies (SHAs), territorial education agencies (TEA) and local education agencies (LEAs). This document will from this point forward refer to the previously mentioned groups as “school health professionals”. School health professionals may utilize this tool to:

- Self-assess areas of professional strength related to job responsibilities
- Self-assess professional development goals and needs
- Assess work team strengths and weaknesses
- Develop job descriptions which accurately explain the full scope of work
- Provide a framework for designing school health professional coaching/mentoring programs
- Provide a framework for designing professional development course work

### How This Document Evolved: The TDC Competency Development Project and the Competency Development Work Group

The Training and Development Consortium (TDC) was originally established as a partnership consisting of the CDC’s Division of Adolescent and School Health (DASH), Education Development Center’s National Training Partnership (NTP), the Massachusetts Department of Education, the San Francisco Unified School District, and the West Virginia Department of Education. The consortium was established to develop a coordinated approach to address the training and assistance needs of its constituency— school health professionals — in order to strengthen programs and improve the health of young people. TDC members jointly planned and delivered professional development and learning opportunities for DASH-funded state, territorial and local grantees. The TDC provided a range of high quality, tailored learning opportunities grounded in constituents’ self-identified needs and interests.

TDC members made a commitment to develop a competency assessment tool for school health professionals. The overall goal of increasing the effectiveness of school health professionals through competency-based professional development opportunities is to

move the focus from disconnected learning opportunities to true professional development and evolution through continuous improvement.

In 2000, staff from the National Training Partnership at the Education Development Center, Inc. researched and pilot tested an approach to developing competencies for directors of training in SEAs and LEAs. Through its preliminary research, NTP staff discovered that competency development is a fairly complex process that requires:

- an extended timeframe (one to two years)
- practitioner involvement
- broad-based review and revision
- opportunities to work with draft competency descriptions that are refined over time

The first phase of the process involved the creation of a Competency Development Work Group. Individuals from across the country were nominated and selected by a group of peers to serve as members of the group. These individuals were DASH-funded SEA/LEA managers who:

- represented the range of DASH funded programs—state and local agencies funded for HIV-only activities and state agencies funded for infrastructure development
- had significant experience managing DASH-funded programs
- were extremely familiar with DASH cooperative agreement requirements
- were willing and able to participate in the work group activities

The TDC convened this work group for five days in February 2001 to develop a draft document. The goals of the five-day meeting were to:

- Create a framework for the competency development process
- Identify key responsibilities of DASH-funded program staff
- Identify the competencies needed to address each key responsibility

To accomplish these goals, the work group reviewed and discussed the funding mechanism for DASH-funded SEA/TEA/LEA projects, Program Announcement 805. The group identified key areas of responsibility outlined in the program announcement and developed draft competencies for each area of responsibility. (While DASH released a new Program Announcement for SEA/TEA/LEA in 2002, this competency document is

based on the assumption that the key responsibilities of SEA/TEA/LEA grantees have not been significantly altered.)

During 2001 and early 2002, these responsibilities and competencies were then formatted into a self-assessment tool, pilot-tested with 14 DASH-funded program managers, and revised again. Finally, the TDC provided training and assistance on using the tool as a mechanism for SEA/TEA/LEA program managers to select professional development opportunities that support managers' continuous improvement.

### **Organization of this Document**

This document is divided into two levels of specificity. The first level identifies nine school health program professional responsibilities:

- Management: the provision of leadership and vision to ensure the accomplishment of program goals and objectives
- Programmatic Needs Assessment and Strategic Planning: the use of a variety of mechanisms to gather and analyze health related information (including the needs of target populations) to determine the current status of program resources, services, and gaps in order to steer programmatic efforts in a productive and strategic manner
- Collaboration: the process of identifying appropriate partner organizations and cultivating relationships with those organizations to achieve results that would not be possible with any one organization alone
- Policies: the development, communication, and monitoring of governing protocols (e.g., laws, regulations) that authorize a course of action
- Curriculum, Instruction, and Student Assessment: a standards-based educational program that motivates learners to improve health and avoid risk behaviors and disease. Includes developmentally and culturally appropriate health education instruction and assessment of learner knowledge and skills
- Professional Development (PD) and Technical Assistance (TA): PD: a process that draws on adult learning theories to enhance an individual's (or group of individuals') knowledge, attitudes, skills, and behaviors. TA: a formal/informal process for providing ongoing support and guidance to strengthen and enhance program implementation.
- Marketing, Dissemination, and Communication: Marketing: the art of persuading, selling, and/or convincing target audiences about the benefits of supporting, adopting, and/or implementing proposed strategies. Dissemination: the use of multiple tools and channels to share information about the program

with specific individuals and groups. Communication: the act of conveying information clearly to motivate, persuade, and/or negotiate.

- Monitoring and Evaluation: Monitoring: Keeping track of a prescribed set of people, activities, processes, and results to determine their status at a specific point in time. Evaluation: The process of obtaining accurate and credible information for the purpose of making better decisions about a program.
- Surveillance: A formalized process to gather data in an organized way to ascertain the status of a situation or condition.

In this document, competencies are presented for each area of responsibility. Each section begins with an introduction that includes a definition and description of the responsibility. This is followed by a brief description of the behaviors and attitudes demonstrated by those who are “competent” in the area of responsibility. Then, very specific knowledge and skill competencies are presented.

### **The Outcome: Continuous Improvement**

The aim of this Competency Assessment Tool is to enable school health professionals to:

- better understand the competencies needed to carry out program tasks within their agency
- develop job descriptions which accurately explain the full scope of work
- self-assess areas of professional strength related to job responsibilities
- better understand and self-assess the professional development needs of staff
- select appropriate professional development activities
- utilize professional development activities for continuous improvement
- design staff evaluation frameworks
- assess work team strengths and weaknesses
- provide a framework for designing school health professional coaching/mentoring programs
- provide a framework for designing professional development course work

In addition, findings from the Competency Assessment Tool could be used by:

- CDC project officers to review professional development selections and outcomes with funded partners
- School health professional to identify professional development offerings to meet identified needs

## **DIRECTIONS FOR COMPLETING THE COMPETENCIES SELF-ASSESSMENT**

1. There are a variety of ways to complete this self-assessment. You may:
  - Complete it on your own, rating your own competencies
  - As a Program Manager, complete it yourself as an assessment of your entire program
  - Have everyone on your program staff complete it as an assessment of the entire program, then compile the results
  - For sites with more than one program manager, work with your counterpart to complete the assessment, rating both co-directors' competencies
  - Ask a colleague, supervisor, or mentor to complete it as an assessment of your competencies (they may rate you more objectively than you rate yourself)
2. This document is divided into the nine responsibility areas described earlier. For each responsibility area, please:
  - a. Read the two or three paragraphs of text that describe the responsibility.
  - b. Review the numbered competencies for each area as well as the detailed examples that accompany them (a-x). Then indicate your level of expertise based on the Key provided at the bottom of each page (i.e., highly experienced, experienced, intermediate, novice, or not applicable) for each of the numbered competencies.
  - c. If you choose to, in the Comments column, you may note any specific areas in which you would like to grow professionally.

## DEFINITIONS

<b>Collaboration</b>	the process of identifying appropriate partner organizations and cultivating relationships with those organizations to achieve results that would not be possible with any one organization alone
<b>Communication</b>	The act of conveying information clearly in order to motivate, persuade, and/or negotiate. Communication may employ a variety of forms (e.g., verbal, print, visual, electronic, interpersonal).
<b>Curriculum, Instruction, and Student Assessment</b>	A standards-based educational program that motivates learners to improve health and avoid health risk behaviors and disease. Includes developmentally and culturally appropriate health education instruction and assessment of learner knowledge and skills.
<b>Dissemination</b>	The use of multiple tools and channels to share information about the program with specific individuals and/or groups.
<b>Evaluation</b>	The process of obtaining accurate and credible information for the purpose of making better decisions about a program (see Collins/AED)
<b>Management</b>	The provision of leadership and vision to ensure the accomplishment of program goals and objectives
<b>Marketing</b>	The art of persuading, selling, and/or convincing target audiences about the benefits of supporting, adopting, and/or implementing proposed strategies.
<b>Monitoring</b>	Keeping track of a prescribed set of people, activities, processes, and results to determine their status at a specific point in time.
<b>Policies</b>	The development, communication, and monitoring of governing protocols (e.g., laws, regulations) that authorize a course of action
<b>Professional Development</b>	A process that draws on adult learning theories to enhance an individual's (or group of individuals') knowledge, attitudes, skills, and behaviors (See NSDC and ASCD)
<b>Programmatic Needs Assessment</b>	The use of a variety of mechanisms to gather and analyze health related information (including the needs of target populations) to determine the current status of program resources, services, and gaps

**Strategic  
Planning**

The process of developing a sequence of goals, objectives, and action steps to steer programmatic efforts in a productive and strategic manner.

**Surveillance**

A formalized process to gather data in an organized way to ascertain the status of a situation or condition  
(See YRBS manual and DASH Web site)

**Technical  
Assistance**

A formal/informal process for providing ongoing support and guidance to strengthen and enhance program implementation.  
(See EDC booklet on TA)

## RESPONSIBILITY: Management

This responsibility area addresses the provision of leadership and vision to ensure the accomplishment of program goals and objectives. In general, individuals carrying out these processes demonstrate knowledge and skills in organizing, utilizing and integrating resources to meet programmatic requirements and goals. They do this by hiring and mentoring staff, allocating resources appropriately, developing and overseeing contractors, and maximizing their program’s impact by working collaboratively with staff from other agencies and organizations. They know the policies and protocols of applicable agencies and organizations. They work well with funders to meet program goals. They also possess the ability to recognize when they need help, where to get it, and how to utilize it.

Individuals who are competent in the area of management:

- Believe that effective management is critical in all areas of responsibility
- Believe that management involves continuous review and refinement of strategies to meet program goals
- Appreciate the value of what the program has to offer
- Believe that effective management is key to program success
- Respect the diversity (e.g., racial, ethnic, sexual orientation, socioeconomic) of program staff and the populations they serve
- Believe in the value of celebrating program successes

Competency	Level of Experience*	Comments
<p><b>1. Understand your agency and your partner organizations and work effectively in these environments.</b></p> <p>a. Understand each agency’s priorities, organizational structure, operating procedures, and communication channels</p> <p>b. Understand applicable local, state, and federal laws, codes, mandates, regulations, and contracted labor agreements</p> <p>c. Understand the political context within which you work (e.g., stakeholders, advocates, opposition) and its impact on decision making</p>		
<p><b>2. Understand and manage your agency’s cooperative agreement with CDC/DASH.</b></p> <p>a. Understand your cooperative agreement scope and obligations (e.g., timelines, reporting requirements)</p> <p>b. Maintain ongoing communication with CDC staff to keep them apprised of your program’s status</p> <p>c. Know grants management systems, tools, and support personnel</p> <p>d. Periodically review and refine objectives and strategies to meet program goals (continuous improvement)</p> <p>e. Employ effective meeting facilitation skills to manage collaborative processes</p>		

Table continued...

\* KEY FOR “Level of Experience”

1 - **Novice:** Not experienced or just beginning to gain experience in this area

2 - **Intermediate:** Knowledgeable and skillful in 40 to 60% of these areas

3 - **Experienced:** Knowledgeable and skillful in 60 to 80% of these areas

4 - **Highly Experienced:** Knowledgeable and skillful in 80 to 100% of these areas

N/A - **Not applicable:** Not part of my current job description or responsibilities

## RESPONSIBILITY: Management (cont'd)

Competency	Level of Experience*	Comments
<p><b>3. Understand and manage financial and budgeting issues related to your program.</b></p> <p>a. Know the budgeting/fiscal process in the context of your organization</p> <p>b. Develop and manage the program budget</p> <p>c. Manage the agency's fiscal resources appropriately and responsibly (e.g., purchasing, record keeping, contracting)</p> <p>d. Understand and tap into existing and potential funding streams for your program</p>		
<p><b>4. Hire, manage, and mentor program staff and contractors.</b></p> <p>a. Know your agency's personnel rules and regulations</p> <p>b. Hire and orient a competent and diverse staff in accordance with the agency's guidelines</p> <p>c. Use planning, negotiation, communication, conflict resolution and consensus building skills to work with staff to determine program priorities and assignments and to resolve conflicts as they arise</p> <p>d. Train, motivate, and mentor staff in accordance with the agency's guidelines and in a manner that leads to optimal staff performance</p> <p>e. Evaluate, monitor, and provide feedback to staff in accordance with the agency's guidelines</p> <p>f. Gain staff support for maximum results (e.g., by celebrating accomplishments)</p> <p>g. Select and work with contractors and consultants, as needed</p>		
<p><b>5. Manage your program's grant-making process.</b></p> <p>a. Develop and disseminate requests for applications</p> <p>b. Oversee the proposal review process</p> <p>c. Award grants and monitor grant activities</p> <p>d. Summarize and disseminate information about grantees' activities and successes</p>		

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## RESPONSIBILITY: Programmatic Needs Assessment and Strategic Planning

This responsibility area addresses the development of a well-thought out plan for the program. Assessing programmatic needs entails utilizing a variety of mechanisms to gather and analyze information (including the needs of target populations) to determine the current status of program resources and gaps. Strategic planning is the process of developing a sequence of goals, objectives, and action steps to achieve desired outcomes within an ever-changing context.

In general, individuals engaged in carrying out these processes must be familiar with their organization’s policies and protocols, as well as applicable federal, state, and local laws, regulations, and codes. They have the capacity to develop a strategic plan that outlines an organizational structure for meeting program goals. They also possess the ability to recognize when they need help, where to get it, and how to utilize it.

Individuals who are competent in programmatic needs assessment and strategic planning:

- Believe that these processes lead to positive outcomes in all areas of responsibility
- Appreciate that assessment is key to continuous improvement
- Value detailed long- and short-term planning
- Are open, flexible, and willing to adjust to changing conditions in education and health environments
- Respect the cultural diversity of program participants and the populations they serve

Competency	Level of Experience*	Comments
<b>1. Assess programmatic needs.</b> a. Employ effective methods for assessing the needs of target populations  b. Analyze needs assessment findings  c. Apply assessment findings to program planning and program improvement		

Table continued....

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## RESPONSIBILITY: Programmatic Needs Assessment and Strategic Planning (cont'd)

Competency	Level of Experience*	Comments
<p><b>2. Create effective program plans.</b></p> <p>a. Develop short-and long-range program plans that:</p> <ul style="list-style-type: none"> <li>- are based on needs assessment findings</li> <li>- are consistent with the agency's priorities, policies, and codes</li> <li>- meet funder requirements</li> </ul> <p>b. Identify staff roles and responsibilities to achieve program plans</p> <p>c. Periodically review and refine program plans (continuous improvement)</p>		

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## RESPONSIBILITY: Collaboration

This responsibility area involves forging and maintaining collaborative relationships to enhance staff and organizational capacity to accomplish the goals and objectives of the program. Collaboration is the process of identifying appropriate partner organizations and cultivating relationships with those organizations to meet mutual goals.

In general, individuals engaged in carrying out these processes demonstrate knowledge and skills in identifying people and resources to help meet programmatic needs. They do this by linking with strategic partners both within and across agencies. They must be familiar with various organizations' policies and protocols, as well as applicable federal, state, and local laws, regulations, and codes. They also possess the ability to recognize when they need help, where to get it, and how to utilize it.

Individuals who are competent in collaboration:

- Believe that these processes lead to positive outcomes in all areas of responsibility
- Believe that collaboration is necessary and beneficial for all parties
- Are open, flexible, and willing to adjust to changing conditions in education and health environments
- Respect the cultural diversity of collaborators and the populations they serve

Competency	Level of Experience*	Comments
<p><b>1. Forge and maintain collaborative relationships to support your program.</b></p> <p>a. Identify appropriate partners with whom your program should form collaborative efforts</p> <p>b. Understand the critical aspects (including the benefits) of collaboration</p> <p>c. Facilitate a strong collaborative effort (e.g., with advisory committees, other categorical program areas, contractors, cadres) to support the program</p> <p>d. Negotiate with collaborators to create clearly defined roles, responsibilities, goals and timelines</p> <p>e. Develop Memorandum of Understandings (MOU) with partnering organizations to clearly define roles and responsibilities in each partnership</p>		

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## RESPONSIBILITY: Policies

This responsibility area addresses the development, communication, and monitoring of governing protocols (e.g., laws, regulations) that authorize a course of action. In general, individuals engaged in policy work are aware of and sensitive to the political climate of their agency and the district or state in which they work. They are familiar with applicable federal, state, and local laws, regulations, and codes and they make use of opportune moments to introduce and/or reinforce key policies that enhance health and prevent disease. They link with key partners for policy needs assessment, policy development, and policy monitoring and refinement. They understand how effective policies can work to set the stage for equitable and fair services and programs for all.

Individuals who are competent in the policy arena:

- Believe that these processes lead to positive outcomes in all areas of responsibility
- Value the collaborative approach to policy development, garnering input from all concerned parties
- Believe that it is essential that the rationale and content of policies be clearly understood by those who will be affected
- Recognize that policy monitoring and refinement is critical to the success of policies

Competency	Level of Experience*	Comments
<b>1. Understand the district's/state's political climate and needs related to policy issues.</b> a. Analyze the needs and political climate of the district/territory/state to determine the need for a new policy and policy content  b. Scan the legislature for proposed legislation that may impact existing or proposed policies		
<b>2. Develop, review, and revise policies.</b> a. Understand the internal and external policy development process (e.g., legislative and/or Board timelines; public comment process) and the components of a policy  b. Identify and work with appropriate people to draft effective policies and policy guidance documents  c. Access policy exemplars and utilize policy development resources to develop and/or refine policies  d. Negotiate and collaborate with key groups (including stakeholders) to develop policies that are multi-lingual and user-friendly  e. Use the public comment process to revise and refine proposed policies so they are acceptable to a variety of audiences  f. Translate policies into lay terms  g. Take appropriate action (i.e., support or opposition) related to relevant pending legislation  h. Utilize policy evaluation data to make policy refinements		

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## RESPONSIBILITY: Policies (cont'd)

Competency	Level of Experience*	Comments
<p><b>3. Understand and summarize the impact of policies.</b></p> <p>a. Understand the impact of proposed policies (e.g., political, fiscal, marketing, impact on professional development needs, impact on people)</p> <p>b. Create fiscal and program impact statements of proposed policies</p>		
<p><b>4. Communicate the content and benefits of policies to key audiences.</b></p> <p>a. Develop policy fact sheets, presentations, and/or workshops</p> <p>b. Use communication skills to influence key individuals to support and/or implement policies</p> <p>c. Use appropriate tools, channels, partners, and spokespeople for disseminating policy information to a variety of audiences.</p>		
<p><b>5. Monitor policies and evaluate your program's policy process in an ongoing manner.</b></p> <p>a. Implement a policy monitoring system that includes:</p> <ul style="list-style-type: none"> <li>- timelines for monitoring</li> <li>- a monitoring tool</li> <li>- selection and training of monitors</li> <li>- analysis of data collected</li> <li>- periodic review of all policies</li> </ul> <p>b. Evaluate your program's policy planning, implementation, and communications process/system and use the findings to improve the process/system (continuous improvement)</p>		

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## RESPONSIBILITY: Curricula, Instruction, and Student Assessment

This responsibility area addresses the development, selection, and/or tailoring of a standards-based educational program that motivates learners to improve their health and avoid health risk behaviors and disease. It includes developmentally and culturally appropriate instruction and assessment of learner knowledge and skills.

In general, individuals carrying out these processes demonstrate knowledge and skills in identifying, accessing, and utilizing curricula and student assessment strategies that are effective and meet agency, state, and local requirements. They understand how curricula and effective instruction and assessment contribute to meeting programmatic requirements and goals. They carry out planned activities directly or by hiring staff and/or contractors who can carry out the activities. They understand the interplay of curricula, instruction, and assessment and have the ability to work collaboratively with agency staff from other disciplines involved in similar activities.

Individuals who are competent in curricula, instruction, and student assessment processes:

- Believe that these processes lead to positive outcomes in all areas of responsibility
- Value the use of curricula and instruments that are research/science-based and culturally and developmentally appropriate
- Believe in the value of a comprehensive approach to health education, including HIV prevention
- Believe that well implemented research/science-based curricula can improve students' health and enable them to avoid health risk behaviors and disease
- Believe that their program can provide critical support to educators/curriculum facilitators to enable them to optimally implement curricula

Competency	Level of Experience*	Comments
<b>1. Know curricula, instruction and student assessment needs, resources, and procedures.</b> a. Understand principals of effective health education and youth health risk behavior trends, surveillance tools, and data sources  b. Know policies, procedures, priorities, plans, and constraints of your agency and other important stakeholders related to curricula, instruction, and student assessment		

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## RESPONSIBILITY: Curricula, Instruction, and Student Assessment (cont'd)

Competency	Level of Experience*	Comments
<p><b>2. Develop and disseminate curricula (and/or recommendations for curricula) and student assessment resources.</b></p> <p>a. Know tools and methods for assessing, planning, developing, and/or selecting/recommending curricula, instruction, and student assessment resources</p> <p>b. Develop curricula and/or create recommendations for schools/districts to adopt curricula that:</p> <ul style="list-style-type: none"> <li>– are consistent with education and public health research</li> <li>– are developmentally and culturally relevant</li> <li>– adhere to state/local formats and guidelines are consistent with community values</li> </ul> <p>c. Select, develop, and/or adapt guidelines, resources, and tools for curricula, instruction, and student assessment that are consistent with relevant state, local, and national standards and are culturally and developmentally appropriate</p> <p>d. Use effective channels for disseminating information about curricula, instruction, and student assessment to a variety of audiences</p> <p>e. Articulate how your program’s curriculum, instruction, and student assessment initiatives support education reform and public health initiatives in your state/territory/district</p> <ul style="list-style-type: none"> <li>– Regularly review and revise the plan for curricula, instruction, and student assessment to achieve stated goals (continuous improvement)</li> </ul>		
<p><b>3. Support schools and/or districts as they implement curricula.</b></p> <p>a. Select strategic partners to support curricula, instruction, and student assessment from within and across agencies</p> <p>b. Implement a system for supporting schools and districts as they implement curricula</p>		

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4 - **Highly Experienced:** Knowledgeable and skillful in 80 to 100% of these areas

N/A - **Not applicable:** Not part of my current job description or responsibilities

## RESPONSIBILITY: Professional Development and Technical Assistance

This responsibility area addresses supporting professionals with information, resources, and training opportunities so that they may enhance their efforts to help young people choose healthy behaviors and avoid risky ones. More specifically, professional development is a process that draws on adult learning theories to enhance an individual's (or group of individuals') knowledge, attitudes, skills, and behaviors. Technical assistance is a formal/informal process for providing ongoing support and guidance to strengthen and enhance program implementation.

In general, individuals carrying out these processes demonstrate knowledge and skills in all aspects of professional development and technical assistance. They are able to develop a plan for professional development that includes follow-up and evaluation activities. They are engaged in developing the agency's capacity for providing professional development and ongoing technical assistance and understand why these activities are critical for implementing policies, curriculum, effective instruction, and student assessment.

Individuals who are competent in professional development and technical assistance:

- Believe that these processes lead to positive outcomes in all areas of responsibility
- Believe that professional development and technical assistance are essential for effective policy and program implementation
- Value adult learning as a lifelong process of continuous improvement
- Believe that providing target audiences with high-quality, ongoing professional development opportunities and technical assistance will enable them to improve their professional practices and have a more positive impact on children and youth
- Acknowledge the importance of careful planning and role delineation in the creation and delivery of effective professional development and technical assistance services
- Value the use of research/science-based curricula and instruments
- Believe in the value of comprehensive health education programs

Competency	Level of Experience*	Comments
<b>1. Assess the need for professional development and technical assistance in your district or state.</b> a. Assess the professional development and technical assistance needs of school staff, as well as the services offered by pre-service and in-service providers in your district, territory or state b. Analyze assessment data and apply the findings to improve your program's professional development and technical assistance systems		

Table continued...

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N/A - **Not applicable:** Not part of my current job description or responsibilities

**RESPONSIBILITY:  
Professional Development and Technical Assistance (cont'd)**

Competency	Level of Experience*	Comments
<p><b>2. Develop a plan for providing professional development and technical assistance in your district or state.</b></p> <p>a. Develop a written professional development and technical assistance plan that identifies objectives based on target audience needs and the principles of adult learning and that specifies tasks and timelines</p> <p>b. Be aware of the range of options for providing professional development and technical assistance services and recognize that different options work better for different target audiences</p> <p>c. Negotiate and formalize roles and responsibilities of partners in the planning, delivery and follow-up of professional development and technical assistance</p> <p>d. Understand and be responsive to issues that impact professional development and technical assistance in your district/territory/state (e.g., release time, substitute teacher issues, school calendar, travel restrictions)</p> <p>e. Link your program's professional development and technical assistance efforts with other relevant instructional disciplines and service areas (e.g., literacy, science, other staff development efforts)</p> <p>f. Coordinate an on-going advisory committee for professional development and technical assistance.</p>		
<p><b>3. Market your program's professional development offerings and technical assistance services</b></p> <p>a. Utilize a variety of marketing/communications strategies (e.g., articulating relevant incentives and benefits) and networks to gain support for and participation in your program's PD/TA efforts</p>		
<p><b>4. Implement professional development offerings and technical assistance services</b></p> <p>a. Utilize effective methods and partners for delivering professional development and technical assistance (e.g., training cadres, mentors, contractors, consultants, community based organizations, faith-based organizations)</p> <p>b. Develop and implement a training plan</p> <p>c. Offer professional development opportunities on science-based /best practice curricula</p> <p>d. Select and utilize exemplary facilitators/trainers who:</p> <ul style="list-style-type: none"> <li>- are very familiar with the content</li> <li>- apply theories of adult learning and principles of effective professional development</li> <li>- utilize strategies based on learner outcomes</li> </ul> <p>e. Provide training and ongoing support for training facilitators/cadre members/mentors</p> <p>f. Utilize high quality professional development and technical assistance resources that are appropriate for the target audience and meet their stated needs</p> <p>g. Provide consultation and technical assistance to a variety of audiences</p> <p>h. Refine your program's professional development offerings and technical assistance services based on participant needs and feedback (continuous improvement)</p>		

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N/A - Not applicable: Not part of my current job description or responsibilities

## RESPONSIBILITY: Marketing, Dissemination, and Communication

This responsibility addresses communicating with a variety of audiences about your program. Marketing involves persuading, selling, and/or convincing target audiences about the benefits of supporting, adopting, and/or implementing proposed strategies. Dissemination is the use of multiple tools and channels to share information about the program with specific individuals and/or groups. Communication is the act of clearly conveying information to motivate, persuade, and/or negotiate. Communication may employ a variety of forms (e.g., verbal, print, visual, electronic, interpersonal). Effective communication requires attention to culture, language, and affect.

In general, individuals engaged in carrying out these processes demonstrate knowledge and skills in managing, identifying, accessing, and utilizing a variety of communication and dissemination channels to convey messages to target audiences about policy, curriculum, instruction, and student assessment, as well as professional development and technical assistance. They have the capacity to make linkages between student achievement, health instruction, and the prevention of risk behaviors.

Individuals who are competent in these areas:

- Believe that effective marketing, dissemination, and communication lead to positive outcomes in all areas of responsibility
- Believe in the value of marketing, dissemination, and communication to enhance all aspects of the program
- Display enthusiasm for the program
- Believe that they have the responsibility and skills to market all aspects of the program
- Appreciate the importance of well-honed communication skills for representing all aspects of their program
- Acknowledge and respect the diversity of the audiences efforts (e.g., racial, ethnic, sexual orientation, socioeconomic) they reach through their marketing, dissemination, and communication)

Competency	Level of Experience*	Comments
<b>1. Create a marketing and communications plan.</b> a. Know the target audiences to be reached with communications and marketing strategies b. Develop a marketing and dissemination plan that: <ul style="list-style-type: none"> <li>– lays out goals, objectives, and activities based on needs assessment findings</li> <li>– includes effective communication strategies for reaching a variety of target audiences</li> <li>– aligns with your agency’s marketing protocols, standards, and materials review processes</li> <li>– links student health with academic achievement</li> </ul>		

Table continued...

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## RESPONSIBILITY: Marketing, Dissemination, and Communication (cont'd)

Competency	Level of Experience*	Comments
<p><b>2. Implement the marketing and communication plan.</b></p> <p>a. Develop and deliver marketing/communications messages that clearly present your program's strategies, results, and successes in formats appropriate for a variety of audiences</p> <p>b. Utilize effective customer service principles in all communications with internal and external customers</p> <p>c. Draw upon professional networks and use "the best messenger" for disseminating information to a variety of audiences</p> <p>d. Select and work with a marketing/communications specialist, as appropriate</p> <p>e. Monitor, evaluate, and revise marketing and communications efforts (continuous improvement)</p>		

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## RESPONSIBILITY: Monitoring and Evaluation

This responsibility addresses the examination of program processes and outcomes. Monitoring involves keeping track of a prescribed set of people, activities, processes, and results to determine their status at specific points in time. Monitoring systems track program progress at multiple points in time.) Evaluation is the process of obtaining accurate and credible information for the purpose of making better decisions about the program.

In general, individuals engaged in monitoring and evaluation demonstrate knowledge and skills in all areas of evaluation and assessment. They may do this by identifying and working with consultants and partners within and across agencies. They are skillful in managing monitoring and evaluation processes in the areas of policies; curriculum, instruction, and student assessment; and professional development and technical assistance.

Individuals who are competent in these areas:

- Believe that monitoring and evaluation lead to positive outcomes in all areas of responsibility
- Believe that program monitoring and evaluation result in identifying needs for technical assistance and opportunities to make adjustments to improve the program
- Appreciate and acknowledge the time that students, teachers, and trainers contribute to the evaluation process
- Believe that the program can achieve high levels of school and student participation in evaluation activities

Competency	Level of Experience*	Comments
<b>1. Identify monitoring and evaluation needs in the district, territory or state.</b> a. Identify evaluation needs in the areas of curricula, instruction, student assessment, professional development, and technical assistance b. Identify monitoring needs in the areas of curricula, instruction, student assessment, professional development, and technical assistance		
<b>2. Develop and implement a monitoring and evaluation plan.</b> a. Understand current monitoring and evaluation strategies, methods, and systems, and their advantages and disadvantages b. Understand different types of evaluation (process, outcome and performance) and appropriate uses of each c. Select and work with an evaluator, as appropriate d. Develop and implement a program evaluation and monitoring plan that addresses goals and objectives, instrument development/selection, protocols, timelines, data collection methods, data analysis, and reporting of findings and recommendations e. Identify what decision makers and the public want to learn and integrate this perspective into the monitoring and evaluation plan f. Assess the status of CSHP/CSHE in the district or state on a regular basis g. Tailor surveys to respond to specific populations and/or site/district needs h. Utilize the results of monitoring and evaluation efforts to improve the program (continuous improvement)		

Table continued...

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# RESPONSIBILITY: Monitoring and Evaluation (cont'd)

Competency	Level of Experience*	Comments
<p><b>3. Communicate about/market the program’s monitoring and evaluation efforts.</b></p> <p>a. Use effective strategies to articulate the rationale and benefits of program monitoring and evaluation (e.g., be sensitive to culture, politics, and the messenger)</p> <p>b. Utilize strategies to encourage participation in data collection activities (e.g., incentives, alignment with school/district mission, public acknowledgement of school/district participation)</p> <p>c. Summarize the results of monitoring and evaluation efforts so they may be communicated through effective channels and strategies to a variety of audiences</p> <p>d. Present data in a manner that:</p> <ul style="list-style-type: none"> <li>– is culturally sensitive</li> <li>– addresses underlying factors</li> <li>– articulates how survey findings relate to the state or district’s mission, to programming in the state/district, and to student achievement</li> <li>– highlights the importance of continued data collection</li> </ul> <p>e. Relate evaluation findings to the program’s vision/mission, goals, and objectives</p>		

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## RESPONSIBILITY: Surveillance

This responsibility addresses the gathering of data in an organized way to ascertain the status of a situation or condition.

In general, individuals carrying out these processes demonstrate knowledge and skills in developing and implementing surveillance activities. They are also able to analyze surveillance data and apply what they learn to modify project activities. They understand how data can be used to support the development of policies and curricula, as well as influence decisions about instruction and assessment.

Individuals who are competent in the area of surveillance:

- Believe that surveillance leads to positive outcomes in all areas of responsibility
- Believe that surveillance is an important tool for program development and improvement
- Appreciate and acknowledge the time that students, teachers, and trainers contribute to the process of surveillance

Competency	Level of Experience*	Comments
<p><b>1. Create a plan for surveillance</b></p> <p>a. Understand surveillance costs and budgeting processes, as well as available resources for surveillance</p> <p>b. Identify and utilize existing surveillance data and surveillance experts from other agencies and organizations</p> <p>c. Understand administrative protocols, including approval process for surveys as well as the process for internal/external review</p> <p>d. Select and work with a surveillance consultant, as appropriate</p> <p>d. Develop a surveillance plan that:</p> <ul style="list-style-type: none"> <li>– includes survey protocols</li> <li>– discusses cost factors, confidentiality and security issues</li> <li>– meets program data needs and stakeholders’ needs</li> <li>– allows for minimal disruption of classroom instruction</li> <li>– outlines data analysis and reporting strategies</li> </ul> <p>e. Outline data analysis and reporting strategies</p> <p>f. Utilize a variety of formats to collect data.</p>		

Table continued...

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## RESPONSIBILITY: Surveillance (cont'd)

Competency	Level of Experience*	Comments
<b>2. Implement the surveillance plan.</b> a. Develop and implement tracking system procedures b. Train professionals to administer survey instruments c. Negotiate with school and district decision makers to maximize student and school survey responses		
<b>3. Analyze and apply findings from surveillance efforts.</b> a. Analyze survey results and use a variety of formats to present findings b. Use findings to inform program planning and to make midcourse corrections (continuous improvement)		

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