**Pennsylvania General Core Competencies for**
**Relationship-Based Technical Assistance**
*Self-Assessment Checklist*

## Rationale

This document contains general core competencies that are essential for all effective relationship-based technical assistance strategies. The competencies address skills, knowledge and attitudes that lay the foundation for developing a professional relationship with all clients and promoting a strength-based approach to continuous quality improvement. This tool is designed to be used across technical assistance systems and is intentionally written using open ended language. It should be interpreted to reference the context of the technical assistance provided. For example "Standards of Quality" refers to the standards accepted by the field in which the technical assistance is provided.

## Completing the Competency Self-Assessment Checklist

1.  **Complete the Self-Assessment column:** Indicate the date completed in the appropriate column. Three columns are provided so self-assessments can be repeated at regular intervals (at least annually). Ongoing self-reflection is recommended.

2.  **Assess your abilities using:  B=** Beginning    **D=**Developing    **P=**Proficient

    **Beginning –** You have little knowledge and skill in this area and you need more information.
    **Developing -** You have some knowledge and skill in this area, but need more.
    **Proficient –** You have extensive knowledge and skill in this area and do not require additional professional development at this time.

3.  **Education/Professional Development column:**
    Record the professional development taken that relates to each content area and the date of the professional development activity.

4.  **Notes/Self-Reflection Section**
    Use as a place to record your thoughts on the professional development that was taken.
    Reflect on the professional development you have taken and how it has affected your own growth.
    What outcomes have been achieved as a result of the professional development?

    **\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\***

**Name:**_____

**Job Title:**_____

**Agency:**_____

**Employment Address:**_____

**City:**_____ **State:**_____ **Zip:**_____

**Phone:**_____

**E-Mail:**_____

# Content Area 1: Professionalism
The conduct, aims, or qualities that characterize a person in a work setting or profession.

**Education/Professional Development**:
(ex: college course, workshop, conference, webinar, etc.
Include title and date of professional development)

**Self-Assessment**:
 **B=**Beginning  **D=**Developing  **P=**Proficient

| Content Area 1: Professionalism | B-D-P *Dates of Self-Assessment* | | |
|---|---|---|---|
| *Essential knowledge and skills:* | | | |
| 1.1 Demonstrates understanding of Pennsylvania's Early Childhood systems and Early Childhood content knowledge as defined by relevant policies, regulations, and standards required by individual technical assistance organizations | | | |
| 1.2 Demonstrates content competence in child development, curriculum, child assessment, standards, working with families, health and safety standards and business practices as required by individual technical assistance organizations | | | |
| 1.3 Develops and maintains an awareness of current research | | | |
| 1.3a Demonstrates the ability to incorporate best practices into work with clients | | | |
| 1.4 Advocates, supports, and works towards standards of quality | | | |
| 1.5 Demonstrates leadership in the field through ongoing professional development and networking at the local, state and national level | | | |
| 1.6 Develops and maintains skills in various forms of technology needed for successful completion of job responsibilities | | | |
| 1.7 Develops and maintains an awareness of other TA systems and how to access those resources to support the client | | | |
| 1.8 Demonstrates knowledge of and adheres to a code of ethics for making professional decisions | | | |
| 1.9 Understands and demonstrates the ability to maintain confidentiality in all areas | | | |
| 1.10 Demonstrates ethical and professional behavior, including trustworthiness and integrity | | | |
| 1.11 Addresses needs of client without personal bias of values, beliefs, prejudices and past experiences | | | |

## Content Area 1: Professionalism (continued)
The conduct, aims, or qualities that characterize a person in a work setting or profession.

**Education/Professional Development**:
(ex: college course, workshop, conference, webinar, etc.
Include title and date of professional development)

**Self-Assessment**:
 **B=**Beginning  **D=**Developing  **P=**Proficient

| Content Area 1: Professionalism | B-D-P *Dates of Self-Assessment* | | | |
|---|---|---|---|---|
| *Essential knowledge and skills:* | | | | |
| 1.12 | Uses reflective practice<br>    a.  to re-examine actions and feelings expressed by client<br>    b.  to solve ethical dilemmas<br>    c.  to reflect on his/her own work | | | | |
| 1.13 | Demonstrates Cultural Competence when providing technical assistance by implementing a variety of strategies, such as: | | | | |
| 1.13a | Uses evidence-based practices that are culturally and linguistically competent; | | | | |
| 1.13b | Collects and analyzes data using variables that have meaning to and an impact on culturally diverse groups | | | | |
| 1.14 | Advocates for or with populations that are underserved or unserved | | | | |
| 1.15 | Demonstrates understanding of Developmentally and Culturally Appropriate Practices (reference NAEYC's DAP/DCAP position paper) | | | | |

**Professionalism Notes/Self-Reflection**

# Content Area 2: Principles of Adult Learning

The process of engaging adult learners in the structure of the learning experience (see Andragogy in the glossary).

**Education/Professional Development**:
(ex: college course, workshop, conference, webinar, etc.
Include title and date of professional development)

**Self-Assessment**:
 **B=**Beginning  **D=**Developing  **P=**Proficient

| **Content Area 2: Adult Learning** | **B-D-P** *Dates of Self-Assessment* | | | |
|---|---|---|---|---|
| *Essential knowledge and skills:* | | | | |
| 2.1 | Demonstrates ability to apply motivational strategies in relationship-based (RB) settings | | | | |
| 2.2 | Designs goals and improvement plans in partnership with the client | | | | |
| 2.3 | Acknowledges and builds on the experience and knowledge clients bring to the relationship-based setting | | | | |
| 2.4 | Facilitates opportunities for client to practice new learning before integrating into daily activities | | | | |
| 2.5 | Provides opportunities for client to integrate new learning into their current setting, experience and knowledge base | | | | |
| 2.6 | Lays the groundwork for transfer of learning by using a variety of instructional techniques that promote ongoing learning and the development of communities of practice | | | | |
| 2.7 | Provides client interactions that are tailored to individual learning styles and preferences | | | | |
| 2.8 | Facilitates a comfortable learning environment that acknowledges contributions by all involved | | | | |

| | | | | | |
|---|---|---|---|---|---|
| *2.9* | Demonstrates a commitment to shared learning by using a feedback process that is strength-based | | | | |
| *2.10* | Incorporates a process of goal setting and ongoing review of goals. | | | | |

| **Principles of Adult Learning Notes/Self-Reflection** |
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## Content Area 3: Building Relationships

The process of forming mutual, trusting and respectful relationships with clients through the fair and consistent sharing of information and fulfilling promises to clients.

| **Education/Professional Development**: (ex: college course, workshop, conference, webinar, etc. Include title and date of professional development) | | | |
|---|---|---|---|
| **Self-Assessment**: <br> **B=**Beginning  **D=**Developing  **P=**Proficient | | | |
| **Content Area 3: Building Relationships** | **B-D-P** *Dates of Self-Assessment* | | |
| *Essential knowledge and skills:* | | | |
| 3.1 | Uses positive interpersonal skills to develop a respectful and responsive relationship with client | | | |
| 3.2 | Demonstrates respect for and interest in the individual abilities of client | | | |
| 3.3 | Partners with client to identify learning and communicating styles and preferences | | | |
| 3.4 | Demonstrates feelings of care and empathy that are strength-based and focused on positive change when working with client | | | |
| 3.5 | Provides support as needed by client while maintaining a professional relationship | | | |
| 3.6 | Demonstrates a commitment to the concept of shared learning by using strategies that encourage shared decision making, joint problem-solving, and partnership development | | | |
| 3.7 | Demonstrates cultural competence and understands its relevance to the relationship | | | |
| 3.8 | Provides support to make community connections that build and expand collaborative relationships | | | |

| Building Relationships Notes/Self-Reflection |
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# Content Area 4: Assessment and Planning

The process of working with the client to determine the level of growth and change achieved as well as the next steps for growth and change.

**Education/Professional Development**:
(ex: college course, workshop, conference, webinar, etc.
Include title and date of professional development)

**Self-Assessment**:
 **B=**Beginning  **D=**Developing  **P=**Proficient

| Content Area 4: Assessment and Planning | B-D-P *Dates of Self-Assessment* | | | |
|---|---|---|---|---|
| *Essential knowledge and skills:* | | | | |
| 4.1 | Uses formal and informal observation strategies and tools to gather information | | | | |
| 4.2 | Provides client with the skills and tools necessary to self-evaluate, and the opportunity to discuss/analyze findings | | | | |
| 4.3 | Analyzes the collected data and provides reliable information to client | | | | |
| 4.4 | Works collaboratively with client to:<br>▪ develop a plan for improvement based on measurable goals<br>▪ prioritize needs<br>▪ develop action steps which lead to achievement of established goals | | | | |
| 4.5 | Provides assistance and tools for continuously evaluating progress toward goals | | | | |
| 4.6 | Provides guidance in making adjustments to goals | | | | |

**Assessment and Planning Notes/Self-Reflection**

# Content Area 5: Communication

The shared process of speaking, listening and responding used to achieve mutual understanding and responsive interaction. This process is both verbal and non-verbal.

**Education/Professional Development**:
(ex: college course, workshop, conference, webinar, etc. Include title and date of professional development)

**Self-Assessment**:
 **B=**Beginning  **D=**Developing  **P=**Proficient

| Content Area 5: Communication | | B-D-P *Dates of Self-Assessment* | | | |
|---|---|---|---|---|---|
| *Essential knowledge and skills:* | | | | | |
| 5.1 | Uses a range of effective communication techniques designed to address both verbal and non verbal communication with client | | | | |
| 5.1a | Asks critical thinking questions 'what, where, when, why, who, and how' to clarify beliefs, thoughts, and actions | | | | |
| 5.1b | Demonstrates effective listening techniques with client | | | | |
| 5.1c | Demonstrates effective written communication skills | | | | |
| 5.2 | Demonstrates the ability to facilitate the TA process through timely, goal-focused interactions | | | | |
| 5.3 | Strategically identifies possible conflicts and addresses them through using positive conflict management strategies | | | | |
| 5.4 | Demonstrates the ability to promote cooperation through the facilitation of team building skills | | | | |
| 5.5 | Demonstrates the ability to share information in a timely manner with clients, partners and stakeholders | | | | |
| 5.6 | Demonstrates the ability to summarize the conversation and articulate next steps | | | | |

**Communication Notes/Self-Reflection**

# Content Area 6: Change Process

The process through which the technical assistant facilitates and enables change and all that is implied within that statement, especially to understand situations from an objective standpoint (to step back and be non-judgmental), and then to help the client(s) understand reasons, aims and ways of responding positively according to the client's own situation and capabilities.

**Education/Professional Development**:
(ex: college course, workshop, conference, webinar, etc.
Include title and date of professional development)

**Self-Assessment**:
 **B=**Beginning  **D=**Developing  **P=**Proficient

| Content Area 6: Change | B-D-P *Dates of Self-Assessment* | | | |
|---|---|---|---|---|
| *Essential knowledge and skills:* | | | | |
| 6.1 | Demonstrates an understanding of the change process | | | | |
| 6.2 | Demonstrates the ability to manage and facilitate change | | | | |
| 6.3 | Responds effectively to client's changing needs | | | | |
| 6.4 | Demonstrates understanding that improvement is continuous and takes time | | | | |
| 6.5 | Documents changes occurring with the client | | | | |
| 6.6 | Understands conflict management and demonstrates resolution strategies | | | | |

**Change Process Notes/Self-Reflection**

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### GLOSSARY

**Adult learning:** A cognitive process internal to the learner; it is what the learner does in a teaching-learning transaction and includes the planned and unplanned learning.

**Andragogy:** The process of engaging adult learners in the structure of the learning experience.

**Assessment:** A method that defines strengths, concerns, and needs. Assessment is accomplished by using existing data, careful observation, and reflective practice to examine the progress made towards achieving current goals and implementing positive change. The client may be involved in the assessment process to a certain extent.

**Best Practice:** A technique or methodology that, through experience, professional wisdom, and research, has proven to reliably lead to a desired result. A commitment to using the best practices in any field is a commitment to using the most appropriate knowledge and technology at one's disposal to ensure success.

**Building Relationships:** The process of forming mutual, trusting, and respectful partnerships with clients through the fair and consistent sharing of information.

**Change process:** A process that includes thoughtful planning and sensitive implementation, consultation with, and involvement of, the people affected by the changes. Change must be realistic, achievable and measurable.

**Community of Practice (CoP):** CoPs are used to enhance knowledge, skills, & dispositions and to improve professional practice by engaging in shared inquiry and learning with people who have a common goal. Communities of Practice consist of ongoing interaction of understanding and experience among members. Participants' discourse and reflections may lead to public outcomes that impact the field at large. CoP may evolve from a group of people already meeting or be initiated by individuals who wish to explore ways to improve professional practices for themselves, their programs, or the field as a whole. Group members develop, share, and test ideas regarding individual practice, document outcomes and reflections, and use discourse via face-to-face and electronic communication to draw conclusions.

**Continuous Quality Improvement (CQI)**: CQI is an ongoing process by which an organization makes decisions and evaluates its progress. It is a process of identifying, describing and analyzing strengths and weaknesses. This data is reviewed and can be used to test, implement, and revise solutions.

**Cultural Competence**: The ability to work effectively across cultures in a way that acknowledges and respects the culture and language of the person or organization being served.

**Developmentally Appropriate Practices**: Refers to creating an environment and offering content, materials, activities, and methodologies based on the needs of an individual child. Three dimensions of appropriateness must be considered: age appropriateness, individual appropriateness, and appropriateness for the cultural and social context of the child.

**Evidence-based:** Used to describe practice that features a variety of strategies proven to be effective. Evidence-based practices have demonstrated outcomes that are validated through research.

**Strength-Based/Focused**: The strength-based perspective assumes that the client has the ability to learn new skills and solve problems, and therefore, involves them in the process of discovery, learning, and coping with the challenges they may face in addition to celebrating their accomplishments. This perspective recognizes and makes use of the client's existing strengths and effectively addresses concerns.

**Transfer of Learning:** The ability of a learner to apply the behavior, knowledge, and skills acquired in one learning situation to another.

# Professional Development Plan for TA Consultants

This section provides you with a means to write out your annual professional development plan and evaluate the accomplishment of your goals.

Follow these steps to complete your plan and evaluate the outcomes at the end of the year:

**Review** the competencies where you already demonstrate developing competence or proficiency.

**Identify** the areas and competencies in which you need more education, information, or guidance.

**Determine,** through personal reflection or through discussion with your supervisor, what you will be able to accomplish as your yearly professional development goal(s).

**Identify** professional development experiences that help you meet your professional development goal(s).

**Participate** in the experience and maintain a record of your participation.

**Consider** how well the experience helped you achieve your professional development goal(s).

**Indicate** the date that your goals were achieved.

**Write** your reflections about the experience, your professional development goals, and how your experiences from the year can be used in putting together your professional development plan for the next year.

**Take** advantage of the professional development opportunities that are available through the cross system technical assistance network.

*Maintain contact with other TA Consultants through the Cross Systems Professional Development/Technical Assistance message board on the PA Keys website. Contact the PA Key at 800-284-6031 to receive access to the site.*

**Pennsylvania General Core Competencies for**
**Relationship-Based Technical Assistance**
*Self-Assessment Checklist*
**Professional Development Plan for TA Consultants**

**NAME** _____

**BEGINNING** _____ **ENDING** _____ _____
                        *Month/Year*                                                    *Month/Year*
**NAME OF AGENCY WHERE EMPLOYED** _____

**POSITION OR JOB TITLE** _____

*My goals for the year are to participate in professional development opportunities to develop my knowledge and ability in the following areas:*

**INDIVIDUAL PROFESSIONAL DEVELOPMENT PLAN FOR THE COMING YEAR**
*What professional development did I identify based on my experiences, current skill sets, and educational background?*

| *Content Area* | *Write the Competency* | *Accomplished? Date* |
|---|---|---|
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|  |  |  |
|  |  |  |
|  |  |  |

**PROFESSIONAL DEVELOPMENT AS PROCESS**
*What additional topics and areas did I identify throughout the year that emerged as issues or unforeseen professional development opportunities?*

| *Content Area* | *Write the Competency* | *Accomplished? Date* |
|---|---|---|
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |

**PERSONAL COMMENTS ON HOW YOUR GOALS WERE ACHIEVED IN THE YEAR.**


Reflect on what changes you could make for the next year.