

APHAA Education Strategy

Education Committee
Workshop Report
June 2020



Introduction

On February 13, 2020 the APHAA Education Committee met to review the recommendations outlined in the *Final Report: APHAA Education Strategy* prepared by 4G Education & Training Consortium (4G) – the consultants retained to review APHAA’s Education Strategy and Core Competencies, as well as the *Education Strategy Member Feedback Report*.

The recommendations and steps outlined in the *Final Report: APHAA Education Strategy* focused on the learning needs of CAOs and senior public housing administrators. They are also aligned to APHAA’s 2019-2021 Strategic Plan and APHAA’s Core Competency Modules, which members agreed needed updating and testing for relevancy. The consultant’s report included an action plan and considerations for next steps and implementation, based on a member-wide survey and an environmental scan of educational offerings available to the APHAA membership.

A member visioning exercise was held at the 2019 APHAA Fall Conference where members explored the key recommendations outlined in the consultant’s Final Report. After a presentation from 4G, where the final report recommendations were presented, members provided feedback on the following:

- Core Competency Standards
- Core Competency Modules
- Self Assessment Tools
- Additional Training Opportunities (e.g. external courses, events)
- The Feasibility of an APHAA Learning Management System
- Funding
- Potential Education Partners
- Knowledge Sharing and Networking
- Certification Program
- Communications and Marketing of APHAA’s Educational Offerings

The *Education Strategy Member Feedback Report*, prepared after the 2019 APHAA Fall Conference, revealed members’ desire to explore existing educational resources and partnerships, without the need for a formal APHAA-led certification program, or specific course structure/curriculum. Members articulated a strong preference to leverage external opportunities offered by recognized educational institutions, professional speakers, other organizations’ courses, and materials prepared by subject matter experts in public housing and leadership. They also called upon APHAA to offer programming that could fill educational gaps, explore specific areas of member interest, and offer Alberta-specific perspectives and resources.

The intent of the Education Committee Workshop was to review member feedback and recommended next steps to determine the immediate educational needs of members, as well as the future action plan for APHAA’s Education Strategy.

This report highlights the outcomes of the February 2020 Workshop, with recommendations for the future of APHAA’s educational offerings.

Competency Standards

APHAA's Strategic Plan prioritizes delivery of a comprehensive and diverse education program to better meet the professional development needs of its members. To accomplish this, 4G recommended that APHAA develop up-to-date competency standards for public housing leaders in order to define what is expected for a proficient and experienced practitioner, adept at working in a range of contexts applicable to the public housing sector.

These standards should:

- Identify required performance (behaviour)
- Identify required knowledge (understanding/skill)
- Be stated in plain language that is meaningful and measurable
- Follows a specified format that meets specific criteria

In other words, 4G asked APHAA to determine a common set of professional development outcomes for public housing leaders, which could be used to identify one's personal performance and knowledge of their job functions within the broader housing sector.

In presenting this workshopping objective to the Education Committee, there was much discussion about the different levels of operational performance and knowledge required of a public housing leader, as it can be different depending on the organization's scope. In the interim reports prepared by the consultants, which detailed member survey feedback, many APHAA members spoke to leadership capacities within the context of their organization's size, mandate, scope of work, and even geographic area.

As well, it is important to note that achieving a "CEO" or "CAO" title is not standardized within the sector, meaning that there is no common set of educational qualifications, required years of experience, or career progression path. Some housing leaders can find themselves in this role without any previous housing experience due to their level of education and experience in other sectors, where others have progressed from front-line workers, to management, to senior leaders specifically within public housing. The CEO/CAO title can mean very different things because of this. Therefore, "competency standards" may not be the correct terminology, as this term does not reflect continual improvement and growth. Senior leaders can strive for excellence and seek further professional development, regardless of their experience or education level.

The Committee was mindful that not all APHAA members are CEOs or CAOs, or necessarily want to be. Rather, they may desire to be excellent leaders within their specific senior-level job function. Members should be encouraged to be outcome-driven based on meeting the specific needs of their organization, staff and clients, rather than simply performing job-related tasks well or acquiring required knowledge.

AHA! MOMENT

APHAA's function as a professional association is to empower the continual leadership development of its members, so that they can meet the ever-changing needs of their organization, clients, staff, community, and broader public housing sector. APHAA's Education Strategy will focus on outcome-driven measures that extend beyond basic job functions or "Core Competencies." We want to foster the pursuit of excellence, rather than focusing only on competency.

Based on this, the Committee arrived at “Pillars of Excellence” rather than “Competency Standards.” Again, these were not determined by core job functions or skills needed to perform (what APHAA used to term “Core Competencies”), but rather areas that public housing professionals could continually grow their skills in their pursuit of excellence. These are detailed below.

APHAA’s Pillars of Professional Excellence



Building off of one’s basic knowledge of their job function(s) (or what was formerly termed “Core Competencies”), APHAA’s Education Strategy offers opportunities to develop professional excellence in public housing through the following pillars of excellence:

Individual Excellence

Individual excellence is the pursuit of positive personal development by building capacities linked to a person’s expression of self. These are intrinsic qualities that could be described as “strength of character” as well as “individual performance.” Concepts such as integrity, passion, ethics, accountability, and innovation, as well as functional aspects such as writing, public speaking, and problem solving would fall under individual excellence.

Interpersonal Excellence

Interpersonal excellence is how a person interacts with those around them and how they work with others. Examples of how an individual might display interpersonal excellence include networking, cooperation, negotiating, conflict resolution, emotional intelligence, customer service, building relationships, and navigating social issues.

Operational Excellence

In relation to housing operations, operational excellence could be exemplified by building skills in the following areas: financial management, risk assessment, property management, operational

partnerships (internal and external stakeholders), law, governance, policy, research development, information technology, human resources, advocacy and government relations.

Leadership Excellence

Leadership excellence is not so much about management as it is about developing the pillars of excellence in others. It is exemplified by how an individual coaches, mentors, and builds capacities in others. Leadership involves team building, motivational skills, workload management, prioritization, and decision making.

Organizational Excellence

Organizational excellence is exemplified in how an individual leads an organization through change and growth. Examples include leading a community through the process of addressing its housing needs, planning and visioning the future of an organization, thoughtful succession planning, cultural awareness and developing efficiencies through restructuring, process improvement and change management.

These pillars of excellence will be at the centre of APHAA's Education Strategy work, directing decisions on content offered at APHAA's Spring and Fall Conferences (in-person or virtually), as well as any future webinar or online educational programming (internal or external). Opportunities to partner with subject matter experts in these areas will be explored and presented to the membership for its consideration.

It is also important to note that the Pillars of Excellence are not mutually exclusive, and that there are many overlaps between the skill sets and performance measures that have been articulated under each pillar.

Core Competency Modules – A Shift in Terminology

As stated previously, demonstrating competency is very different from pursuing excellence. In the development of APHAA's Pillars of Excellence, the Education Committee determined that the reason the "Core Competencies" felt outdated was because they did not focus on continual learning and improvement. As a term, "core competency" no longer felt relevant or applicable. Rather, the educational materials that once existed as "core competency modules" were really foundational elements that offered basic knowledge of specific job functions related to working in public housing in Alberta. For this reason, they have been categorized as sector orientation material rather than ongoing professional development.

While the former Core Competency Modules were helpful for those new to senior management roles in the public housing sector, they were not overly useful for members that have been through formal leadership education (e.g. those that hold MBAs or CIH certifications). They are also not as useful for those that have been working in housing for many years and have developed competencies through this experience. Due to this, there is limited opportunity to grow and develop skills within the existing modules, and "core competency modules" should not be the focus of APHAA's direction when it comes to professional development and sector education.

AHA! MOMENT

APHAA's Core Competency Modules are, in actuality, orientation modules for housing professionals. APHAA does offer an "Orientation Module" outside the scope of its Core Competency Modules, but the Orientation material is focused on providing a general overview of the public housing landscape in Alberta. It would make sense to offer the current Core Competency Modules as part of a full Orientation Program, focused on building a members' knowledge of their core job functions.

This discovery made by the Education Committee led to the realization that the current Core Competency Modules should form the basis for new member orientation, and not be an educational "requirement" like courses offered in a certification-type program. Rather the new Orientation Modules/Foundations of Public Housing Modules could be voluntary and taken to fill a member's knowledge gaps. In addition, they can be framed as the foundation on which members can strive for excellence in other areas, identified through APHAA's Pillars of Excellence. The Pillars of Excellence do incorporate aspects of the former core competencies/future Foundations of Public Housing Modules, but push members to develop these skills and performance measures beyond a basic capacity.

Members can direct their professional development through a diagnostic self-assessment tool to identify their unique areas of expertise, while also acknowledging their knowledge gaps. This tool will be used to plan their own professional development plan, and also identify potential mentees and mentors within APHAA's membership. This will be an ongoing tool to track development and progress over subsequent membership years.

This model presents pathways for personal growth and professional development, based on areas of interest that are rooted in core job functions, but can grow into areas of professional excellence.

The Foundations of Public Housing Modules will incorporate past Core Competency Module materials, will be updated preferably by a consultant, and be more reflective of sector best practices and current standards/legislation. The Education Committee, through discussion, agreed that these modules should be as follows:

People Leadership Modules

These orientation modules would replace the current core competency module of “Client Services” but also add in tenancy management, change management, team building principles, building community networks, understanding social issues, and soft skill development.

Governance Modules

These orientation modules would amalgamate the “Strategic Leadership, Governance & Leadership” module with training on developing a political acumen, policy, government processes and a review of legal and regulatory obligations of public housing organizations. It will also involve education on operational and governance boundaries in advocacy and stakeholder relations work.

Asset Management Modules

These orientation modules would offer knowledge development in the following functional areas:

- Human Resources Management
- Capital Planning, Maintenance and Procurement
- Real Estate Management
- Contract Management

It would bring together the current Competency Modules of “Asset Management & Development” with “Risk and Financial Management.”

The Foundations of Public Housing Modules will serve as the foundation for APHAA’s Educational Strategy as an “Orientation.” They can be offered as online-accessible content through the APHAA website’s Members Area. Educational offerings focusing on developing professional excellence can be offered throughout the year, in various ways, and through various partnerships and educational conduits.

More about educational delivery is highlighted in the next section of this report.

Delivery of Educational Offerings

The final report, prepared by 4G, suggested that APHAA move its education modules to an online format, as in-person instruction was less desirable. Members reported having limited time for travel, in-person instruction, and resources. As well, many of the in-person mechanisms that APHAA has historically relied on to deliver the course content are no longer available, and the move to online learning is becoming the norm in these evolving times.

The 4G report assumed that APHAA would be prepared to move ahead with a certification program, offered on a Learning Management System (LMS). After reviewing member feedback received on both of these ideas, the Education Committee determined that a formal certification program was unnecessary, especially given that other certifications are offered by more established professional education organizations. Online courses and educational opportunities that align with APHAA's Pillars of Excellence are already developed available through other associations and educational institutions. These were identified in 4G's interim reports, as well as in the Membership Feedback Report.

It was determined that with limited resources needed to develop a Learning Management System of its own, that APHAA explore partnerships with other associations with this resource to potentially deliver its Foundations of Public Housing Modules (or, in other words, APHAA's Orientation program). In lieu of this, the content could also be delivered through member webinars, offered through widely-available and affordable virtual platforms (e.g. Zoom, GotoWebinar), with reading materials and related published in a Member Area of the APHAA website. If a consultant is retained to create the Orientation Modules, a delivery method/implementation plan would be part of this work.

Ongoing professional development related to APHAA's Pillars of Excellence will be delivered through APHAA's annual events or other online formats. Various streams could be developed, applicable to identified member interest/professional development needs provided through the self-assessment data. As well, online webinars could be developed as needed, and APHAA Administration can market external resources and courses that meet APHAA's Pillars of Excellence. APHAA events also provide opportunities to offer informal networking.

Mentorship will also become a piece of APHAA's education delivery, possibly in a future phase of strategy implementation. A formalized program could be developed through member data collection and self assessment, whereby tools and opportunities are created for members to develop various relationships as mentors and mentees.

Identifying Subject Matter Experts and Potential Partnerships

APHAA's greatest resource is its membership. There are many job function (formerly termed "Core Competency") subject matter experts as well as those exemplifying the Pillars of Excellence that could share their experiences and knowledge through virtual platforms and event sessions.

APHAA also has existing relationships with CHRA Canada, CIH Canada, the NonProfit Risk Management Association, and other housing associations such as ASCHA, BCNPHA and ONPHA. The educational offerings already developed and available could be made more accessible to APHAA members through partnerships and leveraging.

In addition to these existing relationships, the workshop discussion identified other potential education partners:

Red Deer College

Real Estate Institute of Canada

Queen's School of Business

National Affordable Housing Professional Certification (United States)

The next step of the Education Committee's work, as the workshop did not offer adequate time, would be to identify educational partners that are able to deliver professional development that aligns to APHAA's Pillars of Excellence, or offer Orientation (Competency) Modules in a cost-effective, value-added way.

Education Priorities for 2020-2021

The Education Committee brought recommendations, based on this workshop forward to the Executive Committee for review. The following outlines the key Education Priorities over the next year:

1. Adoption of APHAA's 5 Pillars of Excellence:

- Individual Excellence
- Interpersonal Excellence
- Operational Excellence
- Leadership Excellence
- Organizational Excellence

The Education Committee will continue to develop these concepts, identify KPIs related to these Pillars, identify partners, and recommend educational offerings that align with these Pillars. This will be part of the Committee's ongoing workplan and educational content programming for 2020-2021.

2. Develop "Foundations of Public Housing" Modules that focus on the core job functions of public housing professionals (formerly "Core Competencies"). This will involve:

- Hiring a Consultant to develop content and offerings
- Identify methods to deliver the training and develop online member resources.

3. Identify potential partners and education offerings that align with APHAA's 5 Pillars of Excellence and make these available to APHAA members

Summary and Next Steps

In summary, APHAA's educational direction will focus on ways to promote the continual improvement and professional development of its members to meet the ever-changing needs of the public housing sector in Alberta. This will require basic foundational knowledge of one's core job functions, but also provide opportunities for self assessment, the exploration of special interests, and striving for individually-identified outcomes.

APHAA will be presenting this educational direction to the membership through an engagement session, where members can workshop the concepts and present ideas for action and implementation.

Programming in 2020-2021 will focus on the newly adopted Pillars of Excellence, and a consultant will be retained to develop APHAA's Foundations of Public Housing Modules.