



HR DELIVERY

Making Sure HR Delivers

HR DELIVERY WORKSHOP SERIES

Values and Competencies

An introduction to values and competencies in everyday work

Turn broad values and competency language into clearer expectations for everyday work. Explore the Competency and Capabilities Framework, draft observable indicators for one role and test whether colleagues can interpret them consistently and identify relevant evidence.



01 DAY

Introductory taster

IN-HOUSE

Your people. Your context.

PRACTICAL

Explore, discuss and apply

A PRACTICAL STARTING POINT

Understand the topic. Try it in practice.

Values such as integrity or collaboration can mean different things to different people until they are connected with real work. Competency frameworks become more useful when expectations are observable, relevant and proportionate to the role. This workshop helps participants write and test those expectations without turning broad aspirations into unsupported assessment claims.

Introduce the Competency and Capabilities Framework through a small role example. Participants distinguish values, behaviours, technical practice and responsibility, then draft and test a few indicators that could support a clearer development conversation and further work with role holders and specialists.

WHO IS IT FOR?

HR practitioners, learning colleagues, managers and internal framework owners who develop values, competency profiles or role expectations. No previous competency dictionary design or assessment experience is required.

BY THE END OF THE DAY, PARTICIPANTS CAN:

- 01 Clarify framework purpose**
State what decision a values or competency profile should support, identifying the role group, intended users and boundaries of its initial application.
- 02 Connect values with work**
Translate a broad organisational value into a relevant behaviour using a concrete task or decision faced by a selected role.
- 03 Distinguish the layers**
Separate behavioural expectations, technical practice and scope of responsibility, explaining why these layers need different evidence and informed contributors during profile development.
- 04 Write observable indicators**
Draft concise indicators that describe relevant action and context, avoiding vague personality labels, duplicate requirements or expectations outside the role's authority.
- 05 Test shared interpretation**
Use a fictional work example to compare how colleagues interpret an indicator, then revise wording where it produces conflicting or unclear expectations.
- 06 Plan a bounded pilot**
Outline a small development-focused profile pilot with role-holder feedback, content ownership and a review trigger before considering any wider organisational use.

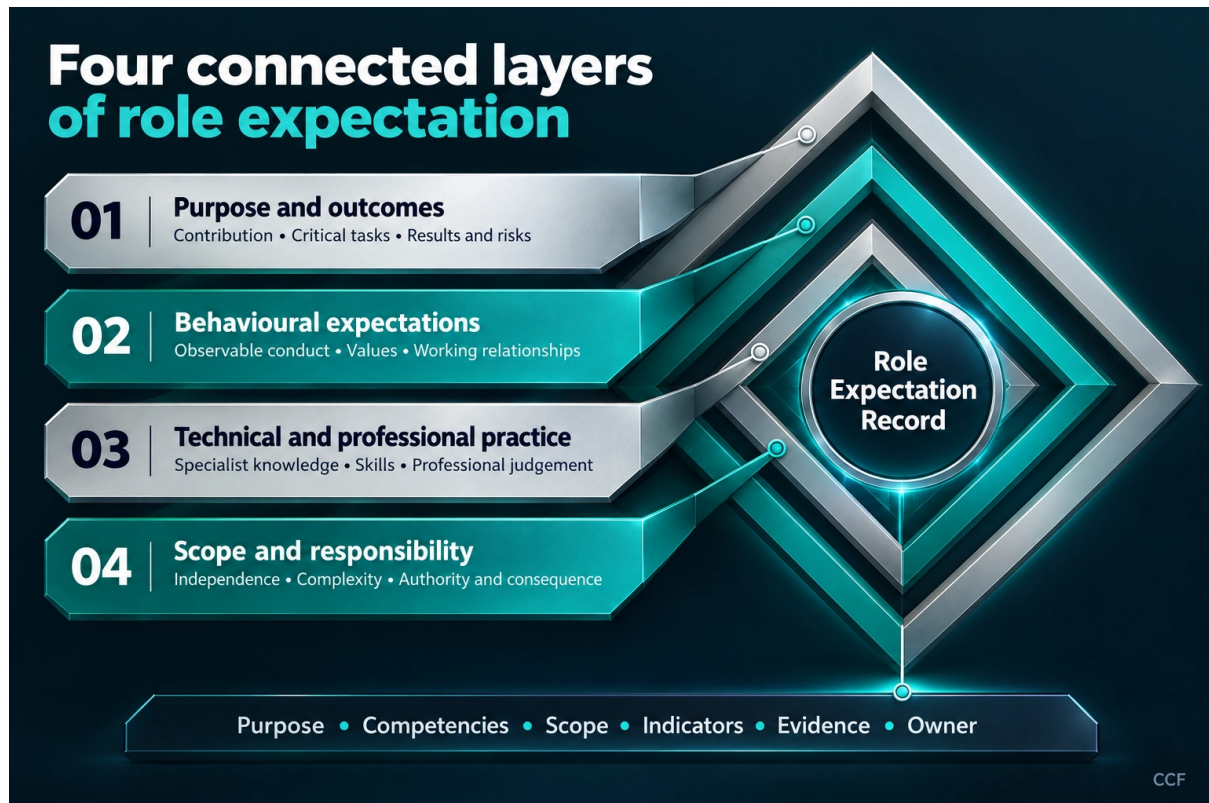
A useful first application

The day drafts selected expectations for an illustrative role. It does not produce an organisation-wide competency framework, validate an assessment, determine job grades or establish professional authorisation or promotion criteria.

THE FRAMEWORK / WORKSHOP FOCUS

HR Delivery Competency and Capabilities Framework

The Competency and Capabilities Framework connects purpose and outcomes, behavioural expectations, technical and professional practice, and scope and responsibility. Six design stages guide the development, testing and governance of useful role expectations.



SIX QUESTIONS TO EXPLORE IN THE WORKSHOP

- | | |
|--|---|
| <p>01 Purpose and outcomes</p> <p>What useful work outcome should this role expectation help people achieve?</p> | <p>02 Values in action</p> <p>What observable behaviour would express this value in the role's work?</p> |
| <p>03 Technical practice</p> <p>Which specialist knowledge and skills require accurate professional input here?</p> | <p>04 Scope and responsibility</p> <p>How do authority, complexity and contribution change the required expectation?</p> |
| <p>05 Test interpretation</p> <p>Can different users recognise the same behaviour and acceptable evidence consistently?</p> | <p>06 Pilot and govern</p> <p>Who will test, own and refresh these expectations as work changes?</p> |

The six panels are workshop focus questions spanning the original four layers and six design stages. Values inform behavioural expectations; participants retain distinctions between behaviours, technical competence, responsibility and separately governed assessment or grading decisions.

[Explore the full model >](#)

LEARN BY DOING

Explore. Challenge. Make the ideas useful.

Short explanations lead into lively exercises, paired discussion and small-group challenges. Participants test ideas, share experience and build a draft together. The tone is engaging and enjoyable, with time to reflect and connect learning to real work.

01 Bring a value into a work moment

Pairs choose a fictional workplace decision and describe what a stated value would look like in action, avoiding generic adjectives and checking whose responsibility the behaviour actually is.

02 Sort the expectation layers

Teams sort mixed statements into behavioural expectations, technical practice and scope of responsibility, then identify duplicates and criteria that confuse competence with authority, grade or personal style.

03 Write and challenge an indicator

Groups draft a small set of indicators for a service supervisor, swap them with peers and use realistic work examples to expose vague wording, missing context or unintended exclusions.

04 Pilot the development conversation

Triads use a draft expectation in a manager-employee discussion, test whether relevant evidence and supported practice can be named and record changes needed before the wording could be used more widely.

DIAGNOSE BEFORE YOU ACT

Evidence > shared feedback > agreed priorities

Use selected diagnostic prompts to distinguish known facts from assumptions. Discuss the findings and agree their meaning before proposing a solution. Feedback is part of diagnosis, not an afterthought.

ONE CASE, DEVELOPED THROUGH THE DAY

A service organisation values ownership, but managers interpret it differently. Some expect employees to solve every issue independently; others expect timely escalation. A competency profile mixes technical knowledge with vague traits such as confident and dynamic. Employees want clearer guidance about acceptable judgement and the limits of their authority.

Groups translate ownership into role-relevant behaviour, separate technical and responsibility expectations and test the revised indicators against a realistic service exception before proposing a limited development-focused pilot with role holders.

THE FACILITATOR WILL

- Invite different perspectives.**
- Make assumptions visible.**
- Welcome constructive debate.**
- Capture practical learning.**



SAMPLE WORKSHOP AGENDA

A working day, with room to think.

09:00-16:30 | Six hours of facilitated learning, plus lunch and breaks. The agenda, emphasis and timings are always agreed with the client, including local scheduling needs.

09:00-09:20

Clarify why expectations are needed

Explore the intended use of values and competency language, then define the role group and development conversation that the workshop profile should support.

09:20-10:15

Explore the four expectation layers

Introduce purpose and outcomes, behaviours, technical practice and scope, showing how the layers connect without treating them as interchangeable statements about capability.

10:15-10:30

Break

10:30-11:30

Translate values into work behaviour

Use service decisions to describe observable expressions of a value, checking context, responsibility and whether employees can identify a relevant example of practice.

11:30-12:30

Write clear and proportionate indicators

Draft role expectations, remove vague traits and duplicates, and distinguish specialist accuracy requirements from behavioural guidance and the authority attached to the role.

12:30-13:30

Lunch

13:30-14:30

Test meaning against work examples

Apply draft indicators to fictional examples, compare interpretations and revise wording where users disagree about the behaviour, standard or acceptable evidence it implies.

14:30-14:45

Break

14:45-15:30

Connect expectations with development

Practise a manager-employee conversation identifying relevant evidence, a realistic practice opportunity and the support needed to develop a selected expectation in everyday work.

15:30-16:10

Review the role expectation draft

Present the revised indicators and pilot proposal, using peer challenge to test usability, evidence clarity and boundaries around assessment, promotion or grade decisions.

16:10-16:30

Plan role-holder involvement and ownership

Choose an expectation to test locally, identify role holders and specialists to involve and agree how feedback and future changes could be recorded.

Translate a broad value into relevant work expectations that people can understand, demonstrate and develop with support.

FROM THE SESSION TO YOUR DESK

Useful models. Practical working records.

The day combines reference materials with drafts developed in the exercises. Each has a clear use beyond the workshop; the work reflects the evidence and perspectives available in the room.

01 Framework purpose brief

A draft statement of the profile's intended users, role scope and developmental purpose, with boundaries that separate clearer expectations from any later assessment, grading or promotion decisions.

Agree what a small competency profile should help people do.

02 Four-layer reference

A concise guide to purpose and outcomes, behavioural expectations, technical practice and scope of responsibility, with examples showing why each layer needs relevant contributors and different supporting evidence.

Keep behavioural, technical and responsibility expectations distinct but connected.

03 Value-to-behaviour worksheet

A worked example translating a broad value into role-specific action within a realistic decision, recording the context, authority boundary and behaviours that would contradict the intended expectation.

Make an organisational value useful in an everyday work conversation.

04 Indicator drafting checklist

A practical checklist for observability, relevance, clarity, proportionality and duplication, with prompts to identify vague personality labels or criteria that require specialist technical review before wider use.

Improve a draft competency statement before adding it to a profile.

05 Role Expectation Record draft

A small exercise profile connecting role purpose, selected indicators, acceptable evidence and supported practice, revised after peers tested the wording against realistic examples from the case work.

Use the draft to prepare a discussion with role holders.

06 Pilot and ownership outline

A development-focused pilot proposal naming intended users, feedback questions, content owners and a review trigger, with unresolved wording or technical questions visible before wider organisational implementation is considered.

Test usefulness before expanding a values or competency framework.

CONTINUE EXPLORING

Continue with the models, diagnostic manuals and development resources on the HR Delivery website. Workshop exercises provide a first application; a full organisational diagnostic or implementation assignment can be agreed separately.

[Open the framework >](#)

[Explore diagnostic resources >](#)

MAKE THE LEARNING COUNT

A better conversation. A practical next step.

Choose one unclear value or competency statement and discuss a concrete work example with role holders. Draft a more observable expectation, test how colleagues interpret it and identify appropriate support before using it in a development conversation.

YOUR FIRST 30 DAYS

01

Days 1-7

Choose an unclear expectation

Agree one role group and statement with the framework owner. Ask role holders which work situations it should guide and record how current wording produces different interpretations or expectations in practical use today.

02

Days 8-21

Draft and test the wording

Write a small number of indicators with relevant managers, employees and specialists. Apply them to realistic examples, compare interpretations and check that acceptable evidence and supported practice can be identified without exceeding role authority.

03

Days 22-30

Review a limited pilot

Use the revised expectation in an agreed developmental setting and gather feedback from the people involved. Decide with the owner what to refine, retain or investigate before considering broader publication or connection to other processes.

Follow-through is participant-led. Additional facilitation, a full diagnostic or specialist support can be agreed separately.

AVAILABLE IN-HOUSE

Shaped around your organisation

The client identifies a role group and one value or competency statement. Participants may bring approved wording and a non-confidential work example; the workshop supplies a fictional role and avoids reviewing individual performance or assessment scores.

PLAN YOUR IN-HOUSE WORKSHOP

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Discuss your workshop

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