

Individual Development Plan

Purpose:

The mission of the Kentucky Public Health Leadership Institute (KPHLI) is to strengthen the public health system in the commonwealth of Kentucky by improving the skills of the professionals who administer state, regional and local public health systems. These improved skills provide public health leaders the opportunity to develop not only professionally, but personally as well. Individual development is an essential component of leadership excellence because it increases competency in developing others and allows time for self-reflection using the outcomes of self and group assessment. Moreover, to become a public health leader, one must have a personal vision and be able to balance personal and professional commitments. The individual development plan helps public health leaders articulate leadership excellence through self-improvement and the development of a personal vision.

Overall Objectives:

1. Utilize the information you obtain from your social style profile, 360-degree feedback, BarOn-EQi assessment, and one-on-one coaching sessions to develop overall goals for self-improvement and complete your individual development plan.
2. Utilize your individual development plan to develop strong individual leadership capacity and excellence.

Overview of Feedback Tools:

The use of feedback from each of the following instruments will enable you to create strategies towards achieving your plan for self-improvement and individual development.

360-Degree Feedback

Is an assessment approach that utilizes multiple rating sources to provide more accurate, reliable, and credible information on leadership ability and performance. This tool assesses individual strengths and weaknesses as a leader and/or manager.

Social Styles Profile

Is an assessment tool that measures an individual's behavior style and versatility (how well one works with others). It enables individuals to build self-awareness and maximize effectiveness in the workplace.

BarOn-EQi Assessment

Is a self-report measure on emotional and social intelligence. It is useful in helping individuals to understand their own behaviors and to identify behaviors that have the most and least positive impact upon performance.

Outcomes/ Final Product:

Individual Development Plan **First Draft Due Friday, June 27, 2008**

Individual Development Plan **Final Draft Due Friday, August 15, 2008**

Individual Development Plan Important Dates

September:

- **Overview of IDP at Summit One**

October/November:

- **Monday, October 1, 2007** – 360-Degree Feedback
- **Friday, October 19, 2007** – BarOn-EQi
- **Coaching Session**

December:

- **Coaching Session**

April:

- **Friday, April 18, 2008** – Social Styles Profile

June:

- **Friday, June 27, 2008** – First Draft of Individual Development Plan

August:

- **Friday, August 15, 2008** – Final Draft of Individual Development Plan



Individual Development Plan Steps and Schedule

Step 1:

The individual development process begins with the completion of the 360-Degree Feedback, also known as the Public Health Leadership Profile, and the BarOn-EQi emotional intelligence assessment. The 360-Degree Feedback is due **Monday, October 1, 2007**, and the BarOn-EQi assessment is due **Friday, October 19, 2007**. After Summit One, the results of these two assessments are given to each scholar. As an introduction to the *Individual Development Plan* a brief overview of these feedback instruments will be presented during Summit One.

Step 2:

Following Summit One, use the initial feedback from your 360-Degree Feedback and BarOn-EQi to begin formulating goals of self-improvement. Both the 360-Degree Feedback and BarOn-EQi provide the opportunity to observe your own behavior from multiple view-points and understand areas for improvement to benefit your personal needs as well as the needs of others.

With the 360-Degree Feedback results, use the top ten highest scoring items, top ten lowest scoring items, and rater feedback from each leadership category (A-O) to reflect on individual strengths and weaknesses. Use the *360 Personal Reflection Questionnaire* (Appendix A) to organize your thoughts and assist you with developing your areas of self-improvement. You may also refer to *Maximizing Results* (Appendix B) for a more in-depth understanding of your 360-Degree Feedback survey.

Also following Summit One, you must schedule a one-on-one coaching session in **October or November** to discuss the BarOn-EQi results and receive feedback on emotional intelligence. The session will take place via telephone conference (1-877-394-0659; access code: 295588#).

After the BarOn-EQi coaching session you will have a better understanding of emotional intelligence and social functioning. You can then explore the 5 composite EQ scales and use the *BarOn-EQi Personal Reflection Questionnaire* (Appendix C) to tie in emotional intelligence with individual development.

The questionnaires should help you think about your areas for self-improvement. After reflecting on these questions, use the *Coaching Session Preparation Worksheet* (Appendix D) to brainstorm/identify possible areas to work on, the rationale for each one, and leadership development opportunities for growths and strengths to build upon. These areas for self-improvement can be personal and/or professional. Use the timeline to diagram and prioritize each focus area.

Step 3:

You will have the opportunity to schedule another one-on-one coaching session to interpret the results of the 360-Degree Feedback, refine your areas for self-improvement, and discuss the *Individual Development Plan*. By this point you should have already identified which areas allow for the greatest leadership development and are most important to you. The coaching session will take place in **December** via telephone conference (1-877-394-0659; access code: 295588#).

Step 4:

After the coaching session and before Summit Two, create a list of 3-5 goals for self-improvement. These goals will later be incorporated into the *Individual Development Plan*. Use the *Individual Development Strategy Chart* (Appendix E) as a roadmap/checklist for you to set objectives as benchmarks toward your 3-5 goals. Also, include which action steps you will take to help achieve your goals and objectives and note what steps, milestones, and successes you have reached. These objectives will need to correspond with the leadership competencies and program curriculum of KPHLI. Appendix F is a list of competencies. The strategy chart is an important step in outlining your *Individual Development Plan*. Once you create your goals and action plan, begin carrying out this plan by seeking feedback and additional ways to keep improving.

Step 5:

Also before Summit Two, complete the third and final feedback tool. The Social Styles Profile is due **Friday, April 18, 2008**.

Step 6:

With the Social Styles Profile you will fall into one of four social style categories. The style is a perception of your own behavior. Independent of style, the profile also discusses how you use your style (versatility). As a leader, a higher versatility score represents your ability to relate to others in a tension-free manner that makes them feel comfortable and helps them to achieve their own work-related goals. Use the profile results and the *Social Styles Personal Reflection Questionnaire* (Appendix G) to think of ways to enhance your versatility to complement your style. Integrate the Social Styles Profile results into your 3-5 self-improvement goals and objectives by identifying commonalities and differences with the 360-Degree Feedback and BarOn-EQI.

Step 7:

At this point you have completed three feedback instruments as well as taken part in coaching sessions to identify your self-improvement goals and action plan for individual development. Use the common elements from your feedback and *Individual Development Strategy Chart* to begin drafting your actual *Individual Development Plan*. Your final *Individual Development Plan* will be a written narrative. To reiterate, the *Individual Development Strategy Chart* is a roadmap/checklist for your final narrative and will be used to execute your action plan for your final paper. See Appendix H for the *Individual Development Plan* template. The first draft is due **Friday, June 27, 2008**.

Step 8:

Continue working on and documenting action steps for your self-improvement goals. The final draft is due **Friday, August 15, 2008**. The final product to be turned in is a narrative paper that is a minimum of two pages, single spaced, which details your strengths and weaknesses garnered from the three assessment instruments, your objectives from your 3-5 goals of self-improvement, and your action plan and results.

360 Personal Reflection Questionnaire

See Appendix B for a Guide to Understanding Your 360-Degree Feedback

Personal Situation and Reflection:

1. Thinking of your expected outcomes for this year in KPHLI, what are your overall goals and goals for self-improvement?
2. Summarize your strengths and developmental needs as you see them. Which of these are you committed to working on?
3. Before seeing your report what did you anticipate about the feedback?
4. Does this feedback reflect your current job situation (Example: challenges, job assignments, relationships to the people who gave feedback, etc)?

Analyzing the Data: Discussing strengths, developmental needs, patterns and themes:

1. What leadership categories do your ten highest and ten lowest scoring items fall under?
2. Were there any surprises in the data?
3. Overall, what do you think and feel about the report?
4. How do you plan to use the data (Example: to get promoted, gain more job satisfaction, get promoted, work more effectively with direct reports, etc.)?
5. Do you have specific questions about the feedback, if so what are they?

Addressing the Gaps: Raising issues not mentioned and discussing areas of confusion:

1. If you see confusing data, unanswered items, or issues which you need to collect more data, how do you plan to obtain more information to clear it up?
2. Compare Self scores with the Combined Others scores. In addition, make comparisons between other profiles (Boss, Peer, Direct Reports), especially if there is a substantial difference in perception between them. Again look at the ten highest and ten lowest scoring items (your higher and lower skill areas) and organize them into four categories:
 - Good news and not surprised (higher skill area with no perception gap) – you said an item was a strength and others agreed.
 - Good news and surprised (higher skill area with a perception gap) – you said an item was a developmental need, but your raters viewed it as a strength.
 - Bad news and not surprised (lower skill area with no perception gap) – you said an item was a developmental need and your raters agreed.
 - Bad news and surprised (lower skill area with a perception gap) – you said an item was a strength but your raters viewed it as a developmental need.

Narrowing the Focus: Identifying key areas to strengthen or develop and actions to take:

1. What overarching themes and/or patterns emerged in your feedback?
2. Do you feel that you have a good understanding of how others perceive you?
3. What present strength might become a weakness in the future? What present weakness may matter in the future?
4. Can you identify one “quick fix”: something small you can change right now to enhance your effectiveness?
5. After reviewing the data and worksheet do you still agree with your initial strengths and developmental needs? Explain.

Maximizing Results

Discovery 360° Leadership Series



Understanding Your Leadership Profile

The purpose of the Public Health Leadership Profile

- To develop stronger leadership ability
- To create a better understanding of strengths and challenges
- To enable you to see how you are viewed by those with whom you work
- To focus on areas for improvement
- To create an action plan for personal development

Leadership Categories

- A Direction and Strategy** – Anticipating future trends; providing a clear vision for the future of the organization; creating strategy, goals and objectives for getting there.
- B Follow Through and Accountability** – Managing the details of initiatives and projects; insuring that skills and resources are available to do the job; tracking and measuring progress.
- C Conflict and Negotiation** – Monitoring personal defensiveness; striving for understanding and win-win outcomes; appropriately challenging others.
- D Communication** – Becoming effective at listening and two-way communication; making articulate presentations and written reports; managing the media.
- E Developing and Mentoring Others** – Managing the development and performance of others; communicating clear expectations; providing effective feedback.
- F Diversity** – Accepting and relating to a broad range of people from different backgrounds; considering the ideas and world views of people with different perspectives; attracting diverse talent.
- G Complex Systems** – Balancing multiple demands and trade-offs; tolerating uncertainty and ambiguity; understanding how the parts of the organizations fit together; understanding the organization’s culture.
- H Collaboration** – Developing and engaging community partners; tapping into and empowering community networks; appreciating community differences.
- I Self Management** – Varying approaches to different situations; operating from a value center; balancing priorities; maintaining composure; learning from experience.
- J. Teams** – Promoting a positive environment in which teams may develop and work; defining team purpose; encouraging team cooperation.
- K Change** – Creating positive change; building support for change; considering concerns and interests of others when implementing change.

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- L. Innovation** – Being open to new ideas and opportunities; encouraging creativity; promoting ‘best practices’.
- M. Client/Customer Service** – Respecting, understanding and anticipating client/customer needs; seeking customer input; working with internal and external customers.
- N. Integrity and Trust** – Building the confidence and trust of others; acting with integrity; following through on promises.
- O. Decision Making and Problem Solving** – Considering consequences of decisions; building support for solutions; involving others in decision-making and problem-solving processes.

Leadership Feedback Report

Page One

Combined Others Profile: Page one of the feedback report contains the Combined Others Profile for each of the fifteen categories in the survey. This profile reveals a composite for everyone (peers, direct reports, boss(es), and others) who completed the survey, with the exception of the Self Profile. Each respondent is weighted evenly in the Combined Others Profile.

Page Two

Self Profile (red profile): The Self Profile is comprised of the self assessment of leadership skills on the fifteen categories of the survey. The data in the Self Profile and line-item report come wholly from the participant’s survey responses.

Boss Profile (green profile): The Boss Profile is based on the survey responses of the boss(es) on the fifteen categories of the survey. This profile is generally comprised of the responses from one individual, but in a situation with two bosses or when a survey from your boss’s boss is requested, the profile may represent data from more than one individual.

Peer Profile (blue profile): The Peer Profile is a composite from co-workers who are at approximately the same level within the organization as the participant. Those who report to the same boss would be in this category, but it may also contain others. This profile will be displayed only if three or more peers responded to the survey, thus protecting the confidentiality of the respondents and insuring more accurate feedback.

Direct Report Profile (yellow profile): The Direct Report Profile is a composite of co-workers who report directly to the participant or to someone who reports to the participant. This profile will be displayed only if three or more direct reports responded to the survey, thus protecting the confidentiality of the respondents and hopefully insuring more accurate feedback.

Pages Three through Six

Line-Item Report: In addition to the graphic profiles, the Leadership Feedback Report lists each item in the survey, groups them by skill area, and provides raw scores for each item broken down by respondent category (self, combined other, boss, peers, and direct reports). Your Leadership Feedback Report will display line-item feedback results only when there are three or more

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respondents in each category. This is to protect the confidentiality of peer and direct report respondents and insure candid feedback.

However, all peer and direct report feedback will appear in the Combined Others Profile.

The assessment scale is as follows:

1 = Rarely

2 = Occasionally

3 = Often

4 = Very Often

5 = Almost Always

N/A = Not Applicable

Each line item also displays the range of scores for the survey item. The range represents the individual lowest and highest score for a particular survey item and is based on the Combined Others category (boss, peers, and direct reports).

The 10 highest and lowest line-item scores will be marked with “+” and “-“. These scores will also be listed on the Top Ten/Bottom Ten summary page (page seven) of the Feedback Report.

In addition, each respondent to the survey is given the opportunity to indicate whether the participant should do “more”, “less”, or “the same” of the skill represented by the item. These responses are displayed to the right of each line item, with each colored box representing one respondent. The boxes are color coded so that respondent groups can be determined.

Page Seven

Top 10 / Bottom 10 Profile: The Top 10 / Bottom 10 Profile highlights the greatest strengths and weaknesses from the Combined Others perspective. It is valuable to examine the Top Ten and Bottom Ten items in the Leadership Feedback Report because it summarizes those areas of greatest skill and developmental need.

Interpreting Your Leadership Profile Data

The **Public Health Leadership Profile** is a powerful diagnostic tool, but to develop strong leadership capability, the results must be combined with an equally powerful developmental process. The Leadership Profile can be used to identify your leadership skills as they exist today, and enable you to envision your goals in the future.

Responses to the profile and line-item scores may vary widely between respondents. The following process is designed to ensure that important aspects of results are reviewed and provide a good foundation for making improvements.

Feedback about the **Public Health Leadership Profile** often feels threatening. It is typical to approach the feedback with some anxiety and defensiveness. Remember that feedback only represents others’ perspectives of you. The more you approach feedback with objectivity, the easier it is to understand the data. Try to avoid the following reactions:

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The **Detective** – Who’s the “#%+@” who said this about me? Wait till I get back to the office.

The **Hero** – I am the greatest and the feedback confirms it. There is nothing I can do to improve.

The **Analyst** – Where are the validity and reliability measures for this survey? I can prove this survey is invalid.

The **Workaholic** – I do not have time for this. I have too many more important things to do.

Things to look for

Identifying the most important developmental needs can generally be accomplished by comparing the Self scores with the Combined Others scores. In addition, the same comparisons can be made between other profiles (Boss, Peer, Direct Reports), especially if there is a substantial difference in perception between them. We recommend that you begin by comparing the Self profile with the Combined Others profile, then look to the Line-Item Report for details on each area identified.

The following review process graphic illustrates the key areas to examine when analyzing **Leadership Profile** results:



☐ Skill Areas

Higher Skill Areas – These skills are identified when the Self and Combined Others profile scores fall between 4 and 5. The “Top Ten/Bottom Ten” page in the Feedback Report highlights the top ten Combined Others line-item scores for further detail when reviewing line-item scores.

Lower Skill Areas – These skills are identified when the Self and Combined Others profile scores are between 1 and 3. The “Top Ten/Bottom Ten” page in the Feedback Report highlights the bottom ten Combined Others line-item scores for further detail when reviewing line-item scores.

☐ Perception Gaps

Starting with the Self and Combined Others profiles, compare the scores on each skill and identify gaps where the respondent’s perspective was not in alignment with your own personal view of your skills. A perception gap occurs when there is a 0.5 or greater difference between Self and Combined Others, Peers, and/or Direct Reports

Identify overestimated capabilities - Those skills for which your Self Scores are between 4 and 5 and your Combined Others scores are between 1 and 3. Using the Feedback Window Worksheets on pages 8 and 9 will be helpful in this process.

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Identify underestimated capabilities - Those skills for which your Self Scores are between 1 and 3 and your Combined Others scores are between 4 and 5. Using the Feedback Window Worksheets on pages 8 and 9 will be helpful in this process.

□ Patterns

After reviewing the feedback report and identifying perception gaps, it is important to look for major patterns in the data. The following questions will provide a starting point for looking at patterns:

Do high scores or low scores tend to fall within a particular category?

Do some skill areas represent clear strengths?

Do some skill areas represent clear targets for improvement?

Do you find that self-perceptions tend to fall in the overestimated or underestimated category?

Does one respondent group's scores (boss, direct report, peers) vary greatly from others?

How does the Boss Profile differ from other profiles?

Organizing Your Leadership Profile Data

The **Public Health Leadership Profile** contains a great deal of information. Creating some structure for the survey data can make it easier to understand as well as reveal trends and patterns in the data that may not be immediately visible. The following feedback window provides an effective way to organize your feedback.

No Surprise	Higher Skill Area 1 No Perception Gap	Lower Skill Area 3 No Perception Gap
	Higher Skill Area 2 Perception Gap	Lower Skill Area 4 Perception Gap
	Good News	Bad News

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1. Good news and not surprised

You said an item was a strength and others agreed. This is probably the most neglected part of feedback. We tend to rush past this section to focus on developmental needs. It is critical that we honestly and clearly recognize and understand what we do well for two reasons. First, we need to capitalize on strengths to deploy a strategy for dealing with weaknesses. Second, research shows that careers seldom derail because weaknesses surface; rather, it is overdependence on strengths that can cause problems.

2. Good news and surprised

You said an item was a developmental need, but your raters viewed it as a strength. These areas are hidden strengths. You may be better at these skills than you realize, or you may be more of a perfectionist than those around you.

3. Bad news and not surprised

You said an item was a developmental need and your raters agreed. Although it is never easy to see that we have developmental needs, it helps to know that we have an accurate perception of these areas. You may have considered these items in the past and have decided that they do not impact your effectiveness. It may be time to reconsider, especially if your role has changed.

4. Bad news and surprised

You said an item was a strength, but your raters viewed it as a developmental need. These items usually represent blind spots. They at least represent a departure from the way you perceive your performance and the way it is perceived by others. Allow yourself some time to reflect on the items in this box before jumping into action to correct them all. Blind spots sometimes require more information gathering on your part.

Sharing your learning with peers and direct reports

When direct reports and peers completed their assessment of you, they provided you with important feedback. Now you are allowed to see yourself as they see you. In some cases, the feedback is affirming in that many of the things you have been doing are positive. However, feedback may also identify a few areas that could benefit from further development. In other cases, feedback may be hard-hitting and even discouraging.

After developing an action plan, it is helpful to go back to respondents and ask for assistance in the developmental process. The following steps allow you to share information appropriately and gain support for your developmental efforts:

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*Share insights gained from the **Public Health Leadership Profile**.*

Share developmental plans.

Ask for support.

State specifically which actions would be helpful in this process.

Sharing feedback results with your boss

Your boss can play a significant role in the implementation of any action plan. S/he can provide additional insight or suggestions and may be able to obtain the resources, assistance, or training needed to implement a plan. The boss's role is particularly important when there is no other facilitator or coach in the interpretation and action-planning stage of the **Public Health Leadership Profile** process.

You may not want to share the actual profile of results with a boss. However, it is important that you share the action plan with your boss so as to obtain the appropriate support and resources needed to make the plan a reality. The conversation should be in a context that is future-focused, positive, and demonstrates proactiveness.

Here are some guidelines to make a discussion with a boss more productive:

- Have a copy of the action plan to share.
- Before the meeting, identify what your boss can do to support you, and be prepared to discuss it.
- Ask your boss to endorse your plan and to acknowledge your efforts when progress is made.

BarOn-EQi Personal Reflection Questionnaire

How Can Emotional Intelligence Help With Individual Development?

The BarOn-EQi measures a type of emotional intelligence; our ability to function emotionally and socially. It is useful to reflect upon why such functioning is important to individual development and thus, the following questions may guide you in this activity.

1. Did the overall results that you received match your own intuitive assessment of your ability to function emotionally and socially? If so what does that mean to you? And if not, did you rate yourself lower or higher than the assessment results? Acknowledging the differences between your intuitive and assessment results how would interpret and explain those differences?
2. Did the strengths revealed on your BarOn-EQi match what you have labeled as your strengths before you took the assessment? Same question with respect to weaknesses?
3. Which of the 15 BarOn-EQi sub-scales do you think are most important to individual development and why?
4. Which of the 15 BarOn-EQi sub-scales are most important in developing leadership skills and why?
5. Which of the 15 BarOn-EQi sub-scales are most critical to doing your job effectively and why?
6. How can you use the results of your BarOn-EQi in conjunction with the results from the other sources of data to assist in your individual development? Please identify 5 strategies you will use to improve your individual development and indicate how you will know that you will be making progress?

Appendix D

Timeline for Self-Improvement – areas that I can improve in the short and long-term



Short-Term

Long-Term

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For example:

Name: _____

Goal 1: Improve Active Listening Techniques (what you are trying to achieve) **Date:** _____

Objective (s) (How you are going to achieve the goal)	Leadership Competency / KPHLI Curriculum component	Action Steps (what will you do to achieve your objective)	Milestones Dates and descriptions	Challenges and Obstacles	Success Indicators	Relation to feedback instruments
Talk Less – Listen More	Communication and listening skills	I will exhibit active listening techniques by focusing my full attention on someone while they are talking and following their comments with questions and statements of clarification. I will refrain from show stopping responses (that won't work – We can't do that here).	6/15 I will let staff and co-workers know that I want to be a better listener and ask for their help and support. 9/1 Ask co-workers if improvement was noticed. 12/1 Ask co-workers if improvement was noticed.	Limited support from supervisor	Co-workers agreed to support efforts and provide gentle reminders. Better understanding and performance in job duties 4 of 6 coworkers noticed improvement	BarOn-EQi scales intrapersonal and interpersonal

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Goal 2: _____ **Date:** _____

Objective(s)	Leadership Competency / KPHLI Curriculum component	Action Steps	Milestones Dates and descriptions	Challenges and Obstacles	Success Indicators	Relation to feedback instruments

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Goal 3: _____ **Date:** _____

Objective(s)	Leadership Competency / KPHLI Curriculum component	Action Steps	Milestones Dates and descriptions	Challenges and Obstacles	Success Indicators	Relation to feedback instruments

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Goal 4: _____ **Date:** _____

Objective(s)	Leadership Competency / KPHLI Curriculum component	Action Steps	Milestones Dates and descriptions	Challenges and Obstacles	Success Indicators	Relation to feedback instruments

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Goal 5: _____ **Date:** _____

Objective(s)	Leadership Competency / KPHLI Curriculum component	Action Steps	Milestones Dates and descriptions	Challenges and Obstacles	Success Indicators	Relation to feedback instruments

Public Health Leadership Competency Framework

Developed By: National Public Health Leadership Development Network

I. CORE TRANSFORMATIONAL COMPETENCIES

A. VISIONARY LEADERSHIP

1. Articulates future scenarios in terms of alternatives for change
2. Develops and articulate vision
3. Encourages and facilitates others to share the vision
4. Applies innovative concepts and methods into strategic decision making process

B. SENSE OF MISSION

1. Identifies, articulate and model professional values, beliefs and ethics
2. Facilitates mission development
3. Identifies and articulates the content, purpose and value of vision and mission statements
4. Facilitates reassessment and adaptation of mission to vision
5. Communicates effectively to translate understanding of mission and vision into action

C. EFFECTIVE CHANGE AGENT

1. Develops creative capacities to optimize learning, critical thinking and analysis skills
2. Models active learning and personal mastery
3. Models and facilitates integration of cultural sensitivity and competence
4. Facilitates utilization and application of systems thinking
5. Articulates the difference between transforming changes affecting general direction/policies and changes affecting day to day implementation and operations
6. Develops and implements evaluation systems in relation to change strategies
7. Identifies, creates and balances critical dynamic tension in relation to change strategies
8. Facilitates application of change theories and concepts to practical situations
9. Facilitates and creates dialogue
10. Builds organizational capacity to envision and select strategies to address acute problems
11. Facilitates strategic and tactical assessment and planning
12. Recognizes and reconciles emotional and rational elements in collaboration building and strategic planning
13. Determines and models when and how to include risk taking in strategic actions
14. Facilitates empowerment of others to take action

II. POLITICAL COMPETENCIES*

A. POLITICAL PROCESSES

1. Directs, facilitates, and refines mission driven strategic planning processes at policy, management and operational levels
2. Identifies and communicates political processes and variables operating at federal, state and local levels
3. Evaluates and determines appropriate actions regarding critical political issues

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4. Identifies and analyzes policy issues and alternatives related to selected public health problems
5. Develops, implements, and evaluates advocacy, community education and social marketing strategies to achieve national, state and local health goals and objectives
6. Utilizes principles of media advocacy to communicate the public health mission, values, objectives, and priorities to target audiences, including executive and legislative bodies, community organizations and stakeholders to facilitate public policy change
7. Assesses existing political resources to address the needs of diverse and underserved communities
8. Develops and implements collaborative strategies, such as coalitions advocacy groups, to involve all constituencies and stakeholders
9. Selects and implements models to guide political action regarding infrastructure development and other capacity-building efforts
10. Cooperates and collaborates with efforts to translate community and organizational analyses and plans into specific regulatory actions and legislative proposals
11. Guides the community and organization in assisting and supporting legislative deliberation and action on public health issues
12. Translates policy decisions into organizational and community structure, programs and services

B. NEGOTIATION AND MEDIATION

1. Identifies escalating public health issues and guide or mediate action to avoid crises levels
2. Guides and mediates the investigation and resolution of acute public health crises
3. Identifies key stakeholders and resources necessary for mediating, negotiating and/or collective bargaining with political sectors, political action committees and/or stakeholders

*** University of North Carolina School of Public Health Doctoral Program Leadership – Competencies were used as a resource for this section.**

C. ETHICS AND POWER

1. Identifies, develops, and utilizes power-based alliances with values-based and ethical perspectives
2. Identifies and communicates how power structures function utilizing knowledge of transitional and conditional ethics

D. MARKETING AND EDUCATION

1. Utilizes principles of social marketing and health education to communicate routinely with target audiences regarding public health needs, objectives, accomplishments and critical or crises related information

III. TRANSORGANIZATIONAL COMPETENCIES

A. ORGANIZATIONAL CAPACITY AND DYNAMICS

1. Creates and employs assessment models to assess organizational environment, needs, assets, resources and opportunities with respect to mission and policy development and assurance functions

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2. Identifies and communicates new system structures as need is identified and opportunity arises
3. Develops system structures utilizing knowledge of organizational learning, development, behavior and culture

B. TRANS-ORGANIZATIONAL CAPACITY AND COLLABORATION

1. Identifies and includes key players, power brokers and stakeholders in collaborative ventures
2. Develops, implements and evaluates collaborative and partnering strategies, including task force, coalition, and consortium development
3. Facilitates networking and participation of all stakeholders including broad and diverse representation of private/public and traditional/nontraditional community organizations
4. Facilitates identification of shared or complementary mission and creation of common vision
5. Creates trans-organizational systems utilizing a common values based approach with ethical standards
6. Develops and evaluates collaborative strategic action plans
7. Facilitates change through a balance of critical tensions within collaborative systems

C. SOCIAL FORECASTING AND MARKETING

1. Identifies and interprets emerging trends
2. Creates predictions and build scenarios
3. Communicates predictions and scenarios and provide information analysis and interpretation to community partners and constituents
4. Utilizes social marketing techniques within collaborative systems. e.g., media, health and risk communications and community relations

IV. TEAM BUILDING COMPETENCIES

A. TEAM STRUCTURES AND SYSTEMS

1. Assesses organizational infrastructure and implement system changes to facilitate team development
2. Facilitates entrepreneurial spirit within team structures
3. Develops team structures and required systems regarding customer service and continuous quality improvement
4. Facilitates outcomes-based team activities related to strategic planning and evaluation objectives
5. Create systems including structures and resources for team and work group evaluation
6. Facilitates the development of learning teams which promote organizational learning from a systems perspective

B. TEAM DEVELOPMENT

1. Facilitates development of shared mission, vision, and value statements
2. Facilitates development of clear goals and objectives
3. Facilitates group process
4. Creates and implements information and communication processes to facilitate team development
5. Facilitates development and utilization of problem solving, conflict resolution and decision making skills

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6. Identifies and communicates need to balance critical tensions for team development
7. Facilitates empowerment and motivation to accomplish objectives
8. Creates incentives and rewards and celebrate accomplishments
9. Facilitates development and integration of cultural sensitivity and competence
10. Facilitates development of risk taking behavior
11. Facilitates development of servant leadership capacity including selflessness, integrity and perspective mastery
12. Develops opportunities and resources for personal mastery and team learning

C. FACILITATION AND MEDIATION

1. Diagnoses and intervenes in marginally productive, dissident or demoralized team situations
2. Clarifies and establishes team member roles and responsibilities
3. Clarifies and facilitates effective work group processes and relationships
4. Facilitates problem centered coaching
5. Utilizes negotiation skills to mediate disputes and resolve conflicts

D. EFFECTIVE ROLE MODEL

1. Models effective group process behaviors including listening, dialoging, negotiating, rewarding, encouraging and motivating
2. Models effective team leadership traits including integrity, credibility, enthusiasm, commitment, honesty, caring, and trust

Social Styles Personal Reflection Questionnaire

How Can You Enhance Your Versatility to Complement Your Style?

1. The results are a self-perception of your social style. What did you find helpful from the results? How will you use these results to improve personal mastery?
2. How does your style affect the way you work with others? How can your style be advantageous to leadership development?
3. Identify the strengths of your style. Identify the weaknesses of your style. Use these to identify self-improvement goals.
4. What dimensions of versatility have the greatest impact on your style?
5. Versatility can be enhanced, but is a four-step process. Of the four steps, which do you need to work on the most to help balance your style?
6. Think about how you can you can connect your Social Style Profile to the results of the 360-Degree Feedback. What does your social style tell you about how others perceive you?

Appendix H

Use this example *Individual Development Plan* as a **guide** to help you organize the information from the three feedback instruments, your one-on-one coaching sessions, and your *Individual Development Strategy Chart*. Your final version of the *Individual Development Plan* should be a minimum of **two pages** in a narrative format, Times New Roman, Size 12 Font. It can be as long as you want, but please remember to keep it concise and to the point.

Individual Development Plan: An Action Plan for Self-Improvement

Your Name

Date

Appendix H

Introduction

As a scholar in the KPHLI program, I was quite uncertain about what I should expect. This past year has allowed me to examine my strengths and weakness both personally and professionally. My experience has given me fresh outlook upon life and has resulted in significant changes...

Feedback Instruments and Coaching Sessions

The formulation of my action plan began with the 360 Degree feedback instrument, which is a comprehensive feedback and development process, which allows peers, bosses, self, and direct reports to comment on my strengths as a leader...

After reviewing my 360 Degree Leadership Profile, I noticed that I have definite areas to target for improvement...

Based on the results from my Social Styles profiles, I also discovered a common theme about my performance as a leader...

Based on the results from my BarOn-EQi Emotional Intelligence...

The coaching sessions with Dr. Weiner and Cynthia also brought to light...

Goals and Objectives

With the above mentioned information I was able to seriously ponder what things I wanted to commit to improve upon. I set a total of five (professional and personal) goals. Three of those goals are achievable within the next 10 months and two goals within the next year....

My objectives to achieve these goals are...

Action Plan

My overall action plan to develop as a leader and achieve my goals is...

Throughout the individual development process my personal vision has/has not changed... but it has directed me toward leadership excellence in the following ways...

Successes, Milestones, Improvement, and Impact

Immediately after I set my goals I noticed that my attitude and vision for my life began to change. I began....

Conclusion

Overall, KPHLI has given me the opportunity to give back not only to others but to myself...

Your Name

Example Individual Development Plan

This is a fictitious IDP and any similarities to those working in public health is purely coincidental

Introduction

During this year in KPHLI, I expect to improve my knowledge of current best practices in the field of public health. Since I have not really had any formal specific education in the field, I have had to “learn as I go.” I started at this agency as an administrative assistant, and have progressed through various supervisory levels to my current position. We have been through a major reorganization at the health department and have basically re-invented the way the department is structured and operates on a daily basis. We have many new staff in supervisory positions and have lost much of our institutional memory through a wave of retirements. One of our challenges is to train and mentor this new group of supervisors and to bring them on board with our vision of a more responsive and progressive agency. Personally, my challenge is to implement the new organizational structure for my division, changing our operation to be similar to other health departments throughout the State. Our problem is we have never done it that way.

After reviewing my Leadership Profile, I was surprised in some areas but felt most of the responses agreed with my own responses. I have definite areas to target for improvement. One concern I have is being in personnel the majority of my work is very confidential so those, other than my director, don’t realize the full picture of what I do and how I interact with other employees. But just taking the actions that I have with those observers responding I see that I need to make things more evident while keeping details confidential.

Feedback Instruments and Coaching Sessions

Upon first reaction, I am disappointed that numerous “peers and community folks” did not respond to my request. I feel that the results would be more comprehensive and broad ranging if that input were given. However, the results that have been provided to me will, without a doubt, allow me to expand my capabilities and provide me with certain areas of improvement. With that said, I completely agree with the results of my Leadership Profile.

It seems that I was harder on myself than my other “reviewers”. I agree with the areas that the profile suggests that I further develop and focus on. I was a bit confused/concerned about the areas in which the responses given ranged from 1 to 5. In other words, how should I view these? Some respondents apparently felt I do a good job while other completely disagreed.

The 4 areas that, when lumped together, indicate areas of improvement are: Conflict and Negotiation, Developing and Mentoring Others, Change & Decision-Making and Problem-Solving. I scored a 4.2 on each of these, as a whole. That is a great starting point. Upon closer inspection of “Boss” and “Direct Report” responses, the picture becomes clearer. My boss indicates that I need to hone my decision-making & problem-solving skills. This doesn’t seem odd at all to me, I just celebrated my year anniversary with the local Health Dept. Previously, I worked for a private not-for-profit hospital and coming into a quasi-state agency from this

Your Name

environment is a difficult change in “learning the ropes”, chain-of-command, new policies, etc... So I believe that this will take will no doubt improve in the near future.

When analyzing my Direct Report responses, I find that my lowest are: Conflict & Negotiation and Developing & Mentoring Others, from this group each ranked at 3.5. Again, nothing really surprising, these are definitely areas of improvement for me as a leader.

One particular areas of concern for me in this process falls under Follow-through and Accountability. The combined Direct Report totals indicate that there was not a lot of variance in the responses. They all were between 3 and 4, I take this to mean that all of my employees were in agreement in their observation of me when it comes to “Understands and Attends to front-line operations”. Talk about an eye-opener!

Now in reflecting on the Top and Bottom Ten, I feel this may be the most beneficial piece of my leadership profile. Providing these specific examples or components that comprise the overall categories is great. Obviously, I need to focus on those areas that are present in the Bottom 10 and stay aware of these 10 “good” things I’m doing. Hopefully, I’ll have the opportunity to improve the bottom 10 by further developing the top 10.

Overall, I agree with the results of my leadership profile. I agree with the areas of improvement and also agree with the identified strengths. There really weren’t any “surprises. The accompanying document that assists in explaining how to interpret the results, particularly the matrix type square is going to be very beneficial in framing a development strategy. Very exciting opportunities!

In relation to the BarOn Emotional Quotient Inventory, there were no surprises. It has always been difficult for me to be completely empathetic to someone’s situation or need. Although, I do listen to them at times it seems that I am the only outlet and appear to turn a “deaf ear.” When I do provide input it may not be what is wanted for the situation. This is a work in progress. My stress and impulsiveness are related to my job and although perceived as an area in need of improvement, I function better with more on my plate, because priorities are sorted from the most urgent to the least. Some of the tasks are statistical in nature and several reports may overlap, and for those of us who like numbers; stress is relevant. Expressing opinion is not difficult for me to do, my anxiety comes from being given a task or position and not being respected for the solutions you provide. This is why I sometimes don’t speak out and/or don’t make decisions with limited information.

Goals and Objectives

I set goals of improving my communication and listening skills, decision making, problem solving, mentoring others, and collaboration with others. My objectives to achieve these goals included becoming more comfortable with conflict resolution, become stronger in delegating to subordinates, engaging others in my personal development plan, and to deliver clear and articulate presentations. The feedback from the 360 degree tool and the coaching session helped me to narrow my focus on areas that I can commit myself to, as well as setting a short and long plan for improvement. I have also been able to understand how others view me and how I view myself. Self reflection has and still is one of the hardest things to do; however, I

Your Name

hope that this plan will make me more effective professionally and personally. Furthermore, it will help me to develop the skills that are necessary to positively impact areas that I have identified. Once I set my goals and objectives, I had to set a plan of action to achieve each of them.

Action Plan

In many instances, I feel that my friends and family will help me more than those who I work with because my friends and family will be completely honest with me, whereas co-workers and subordinates may not. I plan to discuss this report and the feedback with my boss and attempt to further understand his views of my skills and performance. I also plan to meet and discuss this report with my direct reports and ask for their feedback and opinions. To ensure that I am making every effort to specifically address my weak areas, I am going to discuss this with my friends and family and ask them to help me work to achieve my goals. I plan to read and study two books recommended by Cynthia Lamberth, *Crucial Conversations and Crucial Confrontations* before spring. After reading each book, I will develop an action plan for implementing actions and behaviors into my daily routine.

I have already started working on trying to be more direct with everyone that I interact with. If I can overcome this obstacle, I feel that the other goals I am working toward will be much easier to achieve. This plan will be in constant evolution and will be an everyday endeavor. If I can take the baby steps, I feel that I can achieve the goals that I have set. I will need to make a conscious effort to be more open and be considerate of other's ideas and questions. I will have to overcome the idea that I can't always win everyone over to my side. I will have to become more assertive by being willing to voice my opinion when necessary and make an effort to work more closely with those I disagree with or have conflict. And, also read self development books to build capacity.

By distinguishing between critical and non-critical tasks I will be able to act without unnecessary delay. Practicing how to deliver articulate presentations at conferences or in my work place will also help me to do better. This objective is more of a long term goal that is attainable within the next two years. As I progress with KPHLI and this development process I hope to address these issues with each and every person I work with as well as my family and friends. I hope to remain conscious of my weaknesses and faults throughout every day activities as to prevent them from resurfacing. I also plan to get feedback from those I work with as to my development.

Successes, Milestones, Improvement, and Impact

As I move forward, I think it is vital that bi-weekly meetings that have been occurring continue. This will serve as quick fix in a sense that it will improve communication and hopefully help to delegate some of the responsibilities of the program. In my attempt to include the other staff members I must keep in mind that too much delegating can also be taken as me being lazy. So that certainly is something that I must be aware of. I must continue to build upon my strengths of collaboration, customer service, innovation and accountability. It is important to monitor this progression in order to continue my development and identify any new weaknesses or challenges. In times of stress, which will undoubtedly occur, I must be sure to remember what

Your Name

KPHLI is teaching me and excel as a leader rather than fold under the pressure. Hopefully, if things go well, my development as a leader will lead to the development of those that I work alongside and we will all see positive results. Some of my milestones include:

- Milestones:** 10/16 – Will meet with staff to discuss my intentions and their thoughts.
- 10/17 – Will meet with family members to discuss my plan and receive their feedback and thoughts on what I can do to achieve my goals
- 10/30 – Will meet with individuals separately to discuss their individual styles to insure that I am working alongside them using their strengths to their advantages.
- 12/1 – Grant writing will begin and we will review and discuss the roles of one another for the purposes of writing the grant. Portions will be assigned and progress will be monitored during the bi-weekly meetings as we progress.
- 3/1 – At the completion of the grant, I will meet with each staff member and to discuss their experience and how we can improve. What they liked and how I can improve as a leader.

As I learn more from the KPHLI readings, summits and other activities I will look to incorporate them into my day to day activities and my personal development plan. The readings in particular should help me in day to day operations in dealing with others around me.

Conclusion

My plan has allowed me to improve in the areas where others and I thought that I could use some improvement. The document and plan will serve to be a fluid one and open to modification when additional areas of weakness are identified... as they are sure to be. In addition, I hope to carry this plan and what I learn from this experience with me into the future regardless of where I choose to work. If I am to succeed in life and accomplish my goals it is imperative that I continue to improve my ability to work with and lead others.