



THE FEDERATION  
of COMMUNITY SOCIAL SERVICES of BC

**Executive Career Development Program Project**  
***Leadership 2020 – The Emergent and Legacy Leaders Initiative***

**Final Report – Phase One**  
**March, 2012**

**A. Overview**

In 2011, the Federation of Community Social Services of BC (the Federation) began developing a 10-month leadership development program for emerging and legacy leaders in the community social services sector (CSS sector). *Leadership 2020 - The Emergent and Legacy Leaders Initiative* is intended for people who are currently employed in the CSS sector and who are interested in developing their leadership capacities and moving into diverse leadership roles within the sector. *Leadership 2020* is being developed using a generative curriculum design approach in which the intended participants of the program are engaged in the co-creation of the curriculum design and delivery, and provide ongoing feedback and suggestions for improvement and adjustment, while they are engaged in the learning process. This design and development process runs between September 2011 and June 2012 and is financially supported by foundation grants, the Federation's strategic investments fund and, for the elements noted below, by the Labour Market Partnership (LMP) fund. The Federation is committed to the development of human resource capacity throughout the CSS sector and is sharing the results of this design/development process with the Employers Council, the broader CSS sector, and post secondary institutions in the hopes that it will inform management and leadership development initiatives, programs and courses.

In May 2011, the Federation received funding from the LMP fund to support the development of six elements that complement *Leadership 2020* and also 'stand alone' as resources for executive leadership development in the CSS sector in BC. These elements are:

1. Inventory of leadership related (including hard and soft skills) post secondary offerings in the publicly funded colleges, institutes and universities.
2. Updated inventory of leadership development programs as developed by the LMP staff in early 2010.

3. Online consultation that engages leading thinkers and strategists from around the world to inform the development of leadership development curriculum.
4. One to two-day 'think tank' to review the consultation findings and refine the *Leadership 2020* curriculum framework, competencies and delivery approaches.
5. Identification of the key elements to be incorporated into core leadership development curriculum and possible methodologies and approaches to teaching coaching practices, collaborative design, adaptive learning, and social entrepreneurship.
6. Identification and/or development of self-assessment tools to assist *Leadership 2020* participants to assess their strengths and assets, as well as areas for further leadership development.

This report presents the results on each of the above-noted elements and summarizes the key lessons learned to date about the need for, and development, delivery and evaluation of executive leadership training for the CSS sector.

## **B. Inventory of management and leadership development courses and programs in BC**

### **1. Intention:**

As the *Leadership 2020* program was being envisioned and developed a core principle was to *complement* what is currently accessible to CSS staff and volunteers rather than duplicate available offerings. It therefore became necessary to determine what is already available in BC and to assess accessibility.

As was noted in the original proposal for LMP funding, there are diverse course, program, certificate and degree offerings in BC that address management and leadership development. Some of these are business oriented and not oriented to the non-profit CSS sector, while some address the unique characteristics and realities of non-profit management and leadership. Management skill development offerings that are pertinent to leaders and managers within the non-profit CSS sector include: financial management and accountability, human resource development, labour relations management, board relations and governance, communications and media relations, etc. Leadership development offerings consider: transitioning into leadership roles, strategic leadership, change management and organizational development, leadership in challenging times, etc.

### **2. Challenge**

The Federation's review of offerings prior to the development of the LMP proposal and *Leadership 2020* lead to the conclusion that, while a number of management and leadership development courses and programs that might be suitable for employees in this sector are available in BC, there are some barriers to access and engagement, notably:

- It is difficult for employees to readily access information about courses and programs (32% of Federation member agency staff that responded to a survey on management and leadership

development noted that they were not sure what education and training opportunities were available to them).

- The current fiscal context for non-profits within the social services sector is tenuous and funding for professional development is limited or non-existent, therefore employees are often unable to participate in the available programs, especially if tuition is expensive and they are required to travel or take a significant time away from work.

### **3. Database Development**

In order to enhance access to information about education and training opportunities and to provide employers with more information about what is available, costs and accessibility, the Federation has developed a database of both management and leadership development credit and non-credit courses and programs that are relevant to the CSS and non-profit sectors. This is hosted on the Federation's publicly accessible website. The database enables employees, volunteers and students interested in developing their management and leadership knowledge, skills and practices to search for learning opportunities. The available data includes: topic and description, knowledge and skills developed (from a list of 39 subject areas), nature of program (e.g. workshop, seminar, course, degree), style of delivery (e.g., online, face to face, residency), target audience, location, start date, duration and time commitment, cost, pre-requisites, and contact information. The focus is upon courses and programs available from: the public post-secondary institutions throughout BC in health and human service as well as public and business administration departments; and organizations that had previously been identified by the Vancouver Foundation's LMP secretariat.

In order for the database to be useful, it must be accurate and up-to-date. The Federation recognized that those institutions and organizations delivering the courses and programs needed to be engaged in and supportive of the database development and maintenance. Therefore, the design and development of this database was informed by a meeting with the Human and Social Development Deans and Directors Council followed by a series of webinar based focus groups that were held with representatives from both public post-secondary institutions and educational providers that had previously been identified by Vancouver Foundation's LMP secretariat. Collectively a 'win-win' solution was developed so that the institutions and organizations offering courses and programs could ensure that information was more widely available and accessible and yet the Federation was not required to 'chase down' information in order to update the database.

Following the design process with the institutions and providers, the Federation contacted the post-secondary institutions through the HSD Deans and Directors Council and requested that they invite their colleagues to complete forms either online (<http://www.fcssbc.ca/corebc/leadership-2020/directory/form>) or through a form fillable PDF that was then submitted to the Federation for inclusion. The response to this was inconsistent, therefore the Federation took a more proactive approach and investigated and documented the management and leadership offerings in the province's 25 publicly funded post secondary institutions (11 universities, 11 colleges and 3 institutes) and prepared the material. This resulted in a list of 132 program, certificate, degree and continuing education offerings. The program contacts in each of the institutions are now being asked to ensure that the information is accurate and on an ongoing basis to use the online form to add new offerings.

The attached directory provides the core information for each of these offerings. This spreadsheet is provided at the request of the Employers Council so that it may be added to the Vancouver Foundation website. This information is also available on the Federation's publicly accessible website.

#### **4. Sustainability of the Directory**

As noted above, one of the concerns going into this process of developing the directory was how best to ensure currency of information. On an ongoing basis, it is hoped that the institutions and organizations delivering management and leadership training will maintain the currency of the database as they will be able to enter in and modify any listing using an electronic form available on the Federation's website. Their entries will then be approved and uploaded within one business day by Federation staff.

We also realized during the development process that a more proactive approach will also be required. Now that the Federation has developed a more detailed list of contacts for specific schools and departments, these people will be prompted twice a year (in May in anticipation of Fall offerings and November in anticipation of Spring offerings) to review and update listings and add new offerings.

The Federation recently completed a complete overhaul of our two websites and integrated a new content management system that supports the database and we are able to produce spreadsheets that we can share with the Employers Council either upon request or on a pre-determined schedule (e.g. once or twice a year).

#### **5. Observations**

As can be seen from the directory information pertaining to program costs, many of the more comprehensive, leadership-focused offerings that are available have significant tuition costs. This is a barrier to participation for staff in most non-profit CSS agencies. Another observation is that most offerings require in-person attendance either at a course that takes place over weeks or months, or in an intensive residency. This challenges accessibility for learners in some communities either because there is no institution that is resident in their community or the institution does not offer any or many courses and programs that are relevant to management and leadership development. There were surprisingly few online options for learners. What this suggests is that there is a need for accessible, low cost leadership learning opportunities that are relevant to people working within the non-profit and community social care context. Online learning has limitations – particularly for some topics of study - but also enhances access and affordability.

### **C. Online Consultation on Leadership**

#### **1. What leadership qualities and skills are called for in the future?**

Another challenge that was identified through the Federation's early work on recruitment and retention and leadership development was that it was not clear whether the current programs and courses address the leadership qualities that are needed to work within the complex world of non-profit social services now and into the future. While much has been researched and written about leadership development from a business and corporate perspective, relatively little has been

undertaken through a non-profit lens, let alone through a non-profit, community social services (CSS) perspective and for emerging leaders. To address this gap in knowledge so that a well-informed, BC relevant leadership program design could be developed, the Federation tapped into the perspectives and knowledge of both current BC practitioners and leaders, and international thought leaders.

## 2. The BC Perspective

The Federation, with the assistance of a graduate student from Royal Roads University, completed a comprehensive survey of current CSS sector leaders as well as emerging leaders including program managers and front line practitioners (173 respondents), to learn more about what they believed they needed to be successful in their practice as managers and leaders.<sup>1</sup> The results from two questions in particular helped to inform the design of *Leadership 2020*:

- Thinking of the leaders you have worked with who have been effective and motivating, what skills and attributes did they have?
- What skills and attributes do leaders in your field need in order to be prepared for the future?

The top skills and attributes identified by current practitioners and leaders in the CSS sector (as reflected by the Federation membership) were:

- Personal attributes: Leaders that inspire, and that people aspire to be like have integrity and common sense, and are authentic, trustworthy, trusting of staff, knowledgeable, open and curious (“thirst to learn”), respectful, flexible, positive, honest, fair, compassionate, hard-working, encouraging/motivational, supportive, creative, visionary and passionate.
- Communication skills: Successful and inspiring leaders have the ability to connect with diverse audiences through multiple means (good connectors) and communicate clearly what is required.
- Strategic and systems thinking: Strong leaders have capacity to assess situations, see the bigger picture, understand context, discern what is required, envision/be visionary, make decisions and act accordingly.
- Innovative thinking and risk taking: This includes having a long view (foresight), the ability to see opportunities to do things differently, figure out how to bring forward innovations and manage change processes.
- Engagement and collaboration skills: This includes being excellent facilitators, inclusive, open to and respectful of diverse perspectives, good listeners, strong team players, and with an ability to work through differences and conflict and stay connected as collaborators and partners.

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<sup>1</sup> The full report on findings from this process is available from the Federation.

- Technical knowledge and skills: Strong leaders are also good managers and demonstrate a sound management capacity (how to run an organization and raise and manage funds), have clarity about roles and responsibilities, and good supervision skills including knowing how to support and guide staff and then let them get on with their job (i.e., not micro-managing).

### 3. The International Perspective

The Federation then identified over 50 ‘thought leaders’ from throughout the world that have researched, written about, or otherwise become known for their work on leadership development. These people were contacted and asked to contribute to the development of a greater understanding about what leadership qualities, skills and knowledge are being called for now and into the future. They were directed to a survey link and/or engaged in an online ‘conversation’ about what they felt mattered.

As the Federation’s work continued we became aware of other networks, online communities, and strategic thinkers and educators that might have a contribution to make to this dialogue and they were invited to participate. As a result, we engaged over 165 people<sup>2</sup> that are thinking deeply about and practicing in the leadership development field. The feedback was very consistent. Thought leaders believe that the following leadership knowledge, skills and attributes are called for now and into the future:

- Understanding context: Leaders need to understand not only their own organization and its immediate context, but also the broader context for their work and practice, including government and funder context, community context, socio-economic-political context, etc. This awareness enhances resiliency by enabling the leader to assess and discern what might affect their community, clients, staff, agency and either respond or be proactive.
- Collaborative leadership: Ability to collaborate with internal and external partners and the capacity/skills to facilitate collaboration through a variety of participatory/engagement approaches and methodologies.
- Networked leadership: Ability to network across organizational and sectoral lines and develop robust personal and professional networks often in fields that are not directly related to their primary work.
- Personal development: One of the roles of a leader is to develop the people around them (see below), however, many respondents suggested that in order to do this, the leader needs first to “make themselves the work” and “fiercely attend” to their own development in order to be helpful to others. This requires that they be personally attuned and aware of their own strengths and challenges, seek opportunities for growth, seek out mentors and guides, remain open to feedback, develop personal practices, etc. Although in the CSS field such personal investment may be seen as “selfish” many thought leaders said that it was essential if one is to be a leader of influence and “be their finest selves in order to support others to be their finest selves.” This also ties in to

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<sup>2</sup> The conversation threads are ongoing therefore the number of participants will increase over time, and new queries and invitations to contribute will continue to be posted from time to time

another dominant theme in the feedback, which was that leaders need to demonstrate “authenticity” and “ethical behaviour”.

- **Developing people:** A primary role of successful and effective leaders is to develop and support the people around them to be successful and effective. Coaching skills were felt to be very important for leaders to develop, along with an awareness about how to create and sustain healthy, diverse and inclusive workplaces.
- **Communications:** It was noted that leaders need to be influential communicators in both written, verbal and social media forms, with qualities of “openness and transparency” and “reliability and trustworthiness”. The ability to frame the issue and communicate on point was seen to be important. Some also believed that leaders need to be effective storytellers, in order to engage both hearts and minds. They also need to be superb listeners and be willing to have “the difficult conversations” and engage respectfully across differences in order to find solutions and understanding.
- **Entrepreneurship, creativity and innovation:** Many people stressed that the future non-profit CSS world will require even more creativity, innovation and entrepreneurship. The sector has long been “creative in order to meet the needs with virtually nothing to work with” however this has often been a survival tactic rather than an intentional long-range strategy. There is a great deal of discussion about social innovation, enterprise and entrepreneurship that leaders of the future will need to not only be engaged in, but drive in order to ensure that the non-profit CSS sector’s perspective is well represented. Leaders will need to develop skills and knowledge about innovation and methodologies that stimulate innovation. This also ties into the need to create workplaces that inspire creativity and innovation.
- **“Grey Thinking”:** This speaks to the capacity of leaders to deal with “the grey zones” - ambiguity, lack of clarity, unclear direction, and most significantly complexity. Some respondents suggested that leaders should learn about complexity and systems theories and be encouraged to develop their capacity to “be in this grey space, while not being consumed by it” and be able to “see systems and patterns, and be attuned to what is needed in order to adapt and lead.”

#### **4. Summary of Key Findings**

As can be seen from comparing what current BC leaders and practitioners believe to be important and what international thought leaders view as important, there are many overlaps, most notably in the following areas: personal character; communication; engagement, networking and facilitation; collaboration; strategic and systems thinking; coaching and developing people, innovation and risk taking (entrepreneurship). This information was used by the *Leadership 2020* advisors and designers to guide the development of the program design (see below).

It is interesting to note that few of the participants in either process spoke to the need for leaders to be trained in financial management, labour relations, grant-writing, etc (i.e., the ‘hard’ management skills). While it was suggested that good leaders need to know about management, have a strong base of management skills, and know their limitations and when they have to seek out others with deeper skills, it was often emphasized that leadership and management are not the same thing, e.g.,

“management is about things such as procedures, funds, schedules; leadership is about people”. Another consistent premise that was reflected in the thought leaders’s feedback was that we need to stop thinking of leadership as position based e.g., the executive positions, but rather, we need to cultivate a generation of strong and capable leaders that work throughout our organizations.

## **D. Design Think Tank**

In the initial LMP proposal, the Federation committed to undertake a 1-2 day “think tank” to develop a leadership development program design. The findings from the online consultation, the Federation survey and a review of contemporary literature were presented to and worked with over two full-day sessions with the Leadership 2020 Advisory Council (seven members) and the four members of the program design team. The participants developed a plan for executive leadership development that encompassed online learning and two four-day residencies, completed over a ten-month period. Each of the key elements noted in the previous section have been incorporated into the design of *Leadership 2020* as detailed below.

The advisors and design team wanted to scope out the full program, noting where key topics best fit within the overall program, however, as we are using a generative curriculum approach, the participants are regularly asked to provide feedback on the value and relevance of the learning received and to identify what they would like to address next or in the future. As a result, the design continues to evolve both in terms of what content is addressed and at what point, as well as how it is addressed.

The advisors and design team members will be invited to participate in one more ‘design think tank’ in early May in order to plan for the final 5 day residency in June (scheduled for June 24-28) and also to reflect on what has been learned thus far about leadership development in the CSS sector.

## **E. Rethinking Executive Leadership Development – *Leadership 2020* Design**

### **1. Background**

As was noted in the original proposal for LMP funding, a key action area in the Federation’s long term Recruitment and Retention project is leadership development. The CSS sector and the broader non-profit sector is currently facing, and will continue to face, a leadership challenge. The challenge has four key facets:

- The nature of the sector is changing and new leadership attitudes and skills are required.
- A significant percentage of current leaders will be retiring within the next 10 years.<sup>3</sup>
- Current leaders and boards are generally not undertaking succession planning<sup>4</sup>, or believe that they do not have potential leaders within their organizations that will be able to assume senior leadership functions.

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<sup>3</sup> In a recent survey of current federation leaders, 35% of the leaders indicated that they will be leaving the sector within the next 5 years, and an additional 27% (for a total of 62%) will be leaving the sector within the next 10 years.



- Individuals who may be appropriate for leadership positions in the future report that they are unable to access relevant leadership training<sup>5</sup> and they are questioning whether they will step forward due to concerns about current leadership models, practices and expectations.<sup>6</sup>

As we learned through the development of the directory, many management and leadership development programs focus on the development of practical knowledge and skills, such as human resource management and labour relations, board relations and governance, fund-raising and grant-writing, as well as ‘soft’ skills such as effective communication, supervision and staff support, and collaborative practices. Our initial plan for the *Leadership 2020* program design (prior to applying for LMP funding) was to develop a leadership development curriculum consisting of 13 modules that addressed these topics for emerging leaders. However, upon reflection, we steered away from this approach for four reasons:

- There are already courses and programs that aim to meet these knowledge and skill development needs and there is no need to duplicate efforts and curriculum development costs.
- Contemporary leadership development and social ‘changemaker’ research and literature suggests that the leaders of the future will need more than the traditional hard and soft management skills in order to direct sustainable service delivery in a climate of receding funding, increasing demand, and growing operational complexity. This analysis was borne out by the current leaders and thought leaders online surveys.
- Emergent leaders are interested in exploring new approaches and practices. If we are to attract the ‘reluctant’ emergent leaders into leadership positions in the sector we must resist trying to cast them in the same mold as their predecessors.
- While clear that they do not want to be like many current leaders, especially with respect to leadership practices and life-work balance, emergent leaders do value mentorship, learning from exceptional leaders, and cross-generational relationships.

In our proposal for LMP funding, we therefore undertook to: “Identify the key elements to be incorporated into the core curriculum framework as well as possible methodologies and approaches. Particular focus will be paid to determining how best to teach coaching practices, collaborative design, adaptive learning, and social entrepreneurship. An outcome of the above-noted think tank will be to define key curriculum elements to launch leadership 2020. Other elements will be defined over the course of the initial offering by the participants themselves, in keeping with the generative curriculum

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<sup>4</sup> In the above-noted survey, 57% noted that they do not have any succession planning underway in their organization; 35% indicated that there was no one within their organization that is ready or willing to assume senior leadership roles.

<sup>5</sup> In a practitioner-focused survey undertaken by the federation, 45% of the respondents indicated that they have been unable to access professional development training of any type due to a variety of factors including lack of organizational support and funding, difficulty accessing training within their communities, concerns about the relevancy and value of available training, unwillingness to invest their time and resources in programs that do not lead to credentials.

<sup>6</sup> Over 50% of practitioners surveyed about leadership aspirations, indicated that they had doubts about moving into senior roles within this sector; over 35% said that they were likely to leave the sector entirely in the next 5 years to pursue their career aspirations.

approach.”

## 2. Design Principles

The reflections noted above lead the Federation to take a different approach to leadership development. The principles underlying the design and development of the *Leadership 2020* model are:

- **Emergent and legacy leaders learning together:** *Leadership 2020's* comprehensive approach to leadership development considers the generational and career lifespan contexts of participants and draws on their unique perspectives to build a more inclusive and provocative learning experience. Specifically, *Leadership 2020* engages two levels of leadership:
  - Emergent leaders in their mid careers, who have had 10-20 years of experience, who currently provide leadership in roles such as frontline supervisors or program managers, and who are interested in developing their leadership capacity and stepping into other leadership positions in the future.
  - Legacy leaders who have had at least 25 years of experience in the CSS sector and/or in leadership roles, are recognized for their talents as leaders, are in the latter stages of their paid careers, or are newly retired and still involved in the sector as volunteers, advisors, mentors or board members. Legacy leaders are distinctive because they are still deeply interested in developing their own leadership qualities, while also sharing their knowledge and experience with others and encouraging emergent leaders.
- **Build a community of practice:** The Federation has used a community of practice (CoP) model for the Applied Promising Practices projects over the past four years and has come to believe in the value of CoPs. The intention of the *Leadership 2020* approach was to cultivate a CoP amongst the participants so that they sustained their learning and supportive network long past the conclusion of the program.
- **Appreciative approach:** Appreciative ‘ethic’ and approach would infuse our work in the design and delivery
- **Strengths-based approach:** We assumed that people are coming into this learning process with many strengths and talents, especially in practice with clients. Therefore, we have aimed to engage participants not only as learners but also as teachers and guides to their colleagues. Participants were selected for the diverse strengths that they brought to the group, e.g., human resource and labour relations expertise, financial management and program operations expertise, knowledge of Indigenous perspectives, business and entrepreneurial backgrounds, etc.
- **Generative model of design and development:** The generative approach typically implies that the curriculum and its outcomes are not pre-determined, but rather are generated each time the program is delivered, in order to reflect the unique knowledge and the particular needs, goals, and circumstances of the participants and communities engaging in the program. In

*Leadership 2020* we are using a hybrid approach whereby we have identified key learning elements (based on evidence) and are also engaging the participants in an ongoing way to reflect on and amend or add to the curriculum design and learning priorities and approaches. This is an action research approach.

- **Low participation cost:** Given the fiscal state of many of our non-profit and community social services sector agencies, we knew that the agencies had limited capacity to ‘invest’ in the development of their staff. Therefore, we undertook to offer *Leadership 2020* as a tuition-free program. Agencies were asked to cover the travel and accommodation costs for participants to attend the two residency sessions

### 3. Design Framework

Drawing on the feedback from BC leaders and international thought leaders, as well as contemporary literature and research, the advisors and design team developed a simple overall framework for any leadership development initiative. There are three elements:

- **Leadership is personal:** Successful leaders in the CSS sector are self aware, principled and have an array of personal qualities that inspires and motivates others to do fine work. Leadership development therefore needs to attend to the development of the individual and their awareness, strengths and talents.
- **Leadership requires practice:** Knowledge of leadership development has come a long way since the previously dominant ‘trait theory’ era in which it was assumed leaders are born, not made. We operated from the premise that leadership is learned and it takes a great deal of mindful and intentional practice to develop. Leaders need to have access to learning opportunities to build their knowledge and skills base, as well as opportunities to practice with and receive feedback from others.
- **Leadership is participatory (tribal):** This has two facets: the challenges facing contemporary leaders are far greater than they alone can address and leadership requires ‘followership’. Both facets suggest that leaders cannot work in isolation – they must be engaged in and attentive to the development of ‘community’ such as the community of practice described above, as well as a sense of community within their own organizations.

### 5. Curriculum – Core Learning

We have used an evidence-informed co-creative and generative curriculum design approach. This approach is similar to participatory action research that many Council members will be familiar with. It is an approach that the project coordinator, Dr. Jennifer Charlesworth, has used with Indigenous and sector specific learning communities and it has proven to be an effective way of building a robust program design that addresses the learning needs of the target population.

The following table sets out the learning elements and the decisions made about content and delivery methods. They are presented in the order that we recommend they be introduced, although a number of the topics should be addressed several times during the learning process:

Core Learning Element	Models Used or Presented	Delivery Approach
<p><b>What is leadership?</b></p> <p>Concepts:</p> <ul style="list-style-type: none"> <li>• Different conceptions and styles of leadership</li> <li>• Leadership or management – differences and approaches</li> <li>• Refinement of our understanding about leadership</li> <li>• Different organizational paradigms and leadership styles</li> <li>• Internal, external, collaborative/shared leadership</li> <li>• Discerning what is called for and when; adaptation to context</li> <li>• Stepping into a leadership practice</li> </ul> <p>Questions:</p> <ul style="list-style-type: none"> <li>• What does leadership look like? What are the different ways to lead?</li> <li>• What experiences have I had with different leadership styles and what has the impact on me/teams/clients and outcomes been?</li> <li>• What leadership approaches work well or better in different contexts?</li> <li>• How do I develop a repertoire of leadership capacities?</li> <li>• How do I discern what leadership is called for in different situations?</li> </ul>	<p>Different leadership theories</p> <p>Organizational paradigms; the Fifth Organizational Paradigm and leadership implications</p> <p>Different leadership approaches, e.g. Servant Leadership, Tribal Leadership, Participatory Leadership ('First Among Equals')</p>	<p>Webinars with academics/researchers/educators as well as practitioners.</p> <p>Readings/self-study materials distributed through 'leadership investment bulletins'<sup>7</sup></p>
<p><b>Self assessment and 'whole self leadership'</b></p> <p>Content:</p> <ul style="list-style-type: none"> <li>• Strengths and talents; knowledge, skills and competencies</li> <li>• Management and leadership skills</li> </ul>	<p>StrengthsFinder Assessment see <a href="http://strengths.gallup.com/">http://strengths.gallup.com/</a> for</p>	<p>StrengthsFinder assessment completed and submitted in advance of residency</p> <p>CoreClarity results and</p>

<sup>7</sup> A learning tool that has been developed as a result of feedback from the Advisors and participants are 'leadership investment bulletins'. These are prepared approximately 2 times per month and include: recordings, slides and written notes from each webinar; links to related resources including websites, online articles and presentations (e.g., TED talks); suggestions for leadership practice over the coming weeks; additional upcoming learning opportunities such as webinars, workshops, conferences that participants might benefit from

<p>assessment</p> <ul style="list-style-type: none"> <li>Bringing the strengths knowledge and perspective to self and to organization and community (greater return on investment to work with and build on strengths and talents than to overcome deficits)</li> </ul> <p>Questions:</p> <ul style="list-style-type: none"> <li>Discovering our edges at each developmental stage of our career, e.g. what excites us, what do we fear?</li> <li>What leadership and management skills and capacities do we need to be effective leaders?</li> </ul>	<p>information</p> <p>CoreClarity Assessment see <a href="http://www.coreclarity.net/">http://www.coreclarity.net/</a> for information</p>	<p>workshop delivered in person at residency</p> <p>Webinar on personal and professional development and “Finding our Calling”</p>
<p><b>Context for leadership practice</b></p> <p>Content</p> <ul style="list-style-type: none"> <li>Broader context for community social care including political, bureaucratic, fiscal, relational and sectoral characteristics</li> <li>What decision makers (including government officials and politicians, advocates and funders) look for to determine courses of action</li> <li>How to be influential in communicating with different audiences</li> </ul> <p>Questions:</p> <ul style="list-style-type: none"> <li>What do leaders need to understand and be mindful of regarding the broader context for community social care?</li> <li>How do I expand my access to information about the broader context and expand my awareness beyond my program/agency, to my community, the sector and beyond</li> </ul>	<p>No models</p> <p>Verbal presentations and discussion</p>	<p>Webinars with senior bureaucrats (DM’s and ADM’s), (former) Cabinet Minister, Opposition critic, oversight body (e.g. RCYBC); sector leads (e.g. GNPI)</p> <p>Webinar with Communications strategist and journalist</p> <p>Distribution of key documents as they arise (e.g., 2012 budget analysis, MCFD Operational and Strategic Plan)</p>
<p><b>Coaching of self and others</b></p> <p>Content:</p> <ul style="list-style-type: none"> <li>Coaching concepts/intentions</li> <li>Individual and group/team coaching</li> </ul>	<p>“The Work” by Byron Katie</p>	<p>In person delivery (workshops at residency)</p> <p>Experiential/practice</p>

<p>approaches</p> <p>Questions addressed:</p> <ul style="list-style-type: none"> <li>• What is it to be coached and to be a coach?</li> <li>• How do I do this well?</li> <li>• How might I take this practice into my work and community?</li> </ul>	<p>“The Leader’s Discipline” by Roy Group</p>	<p>One-to-one follow up (access to coach on coaching practices)</p>
<p><b>Participatory approaches and community engagement</b></p> <p>Content:</p> <ul style="list-style-type: none"> <li>• Understanding ‘community’</li> <li>• Building relationships with broader constituencies</li> <li>• Collaboration and partnerships – what do we mean and what are relevant models and principles?</li> <li>• Collaborative approaches</li> <li>• Community governance</li> <li>• Engagement design</li> <li>• Inclusion, engagement + “working in the spaces between”</li> <li>• Building networks</li> <li>• Attending to relationships with Indigenous people, communities and organizations; understanding indigenous history and worldviews</li> </ul> <p>Questions:</p> <ul style="list-style-type: none"> <li>• What do we mean when we talk about ‘community’, ‘inclusion’, ‘collaboration’, ‘partnerships’ and ‘community engagement’?</li> <li>• What is my purpose in ‘engaging’ and ‘including’?</li> <li>• What is authentic engagement?</li> <li>• How do I do this and what methodologies can I draw from?</li> <li>• How might we work in new spaces between disciplines, agencies, sectors, systems, histories, worldviews?</li> </ul>	<p>Art of Hosting</p> <p>Appreciative approaches and Appreciative Inquiry (4-D model)</p> <p>Engagement methodologies:</p> <ul style="list-style-type: none"> <li>• Circle work</li> <li>• World café</li> <li>• Open Space Technology</li> <li>• Proaction café</li> </ul>	<p>In person delivery (teachings and practice sessions at residency)</p> <p>Experiential/practice</p> <p>Note: Teachings on each of the methodologies were recorded and are available on FCSSBC Vimeo site, accessible through <a href="http://www.fcssbc.ca">www.fcssbc.ca</a></p> <p>Webinars</p> <p>Indigenous worldviews teachings; workshop – Working in the Spaces Between</p>

<p><b>Systems, Change and Complexity Frameworks</b></p> <ul style="list-style-type: none"> <li>• Change theory and approaches</li> <li>• Understanding systems and complexity</li> <li>• Understanding the economic, socio-political and relational context for CSS work</li> </ul>	<p>Cynefin framework see <a href="http://cognitive-edge.com/">cognitive-edge.com/</a></p> <p>Living and dying systems – two loop model see <a href="http://berkana.org/about/our-theory-of-change/">http://berkana.org/about/our-theory-of-change/</a></p>	<p>In person delivery (teachings and practice sessions at residency)</p> <p>Experiential/practice</p> <p>Note: Teachings on each of the frameworks were recorded and are available on FCSSBC Vimeo site, accessible through <a href="http://www.fcssbc.ca">www.fcssbc.ca</a></p>
<p><b>Communications</b></p> <p>Content:</p> <ul style="list-style-type: none"> <li>• Developing communication strategies; discerning what is called for when?</li> <li>• Different communication tools and approaches?</li> <li>• Communication as a leadership practice</li> </ul> <p>Questions:</p> <ul style="list-style-type: none"> <li>• What communication skills and approaches do I need to understand and develop as a leader?</li> <li>• How do I communicate effectively with diverse audiences?</li> </ul>	<p>No frameworks</p> <p>Presentation followed by discussion</p> <p>Resources/examples shared and discussed</p>	<p>Webinar</p> <p>Practice</p> <p>Resources and self-study materials</p>
<p><b>Organizational cultures and development</b></p> <p>Content</p> <ul style="list-style-type: none"> <li>• Uncovering organizational and team culture</li> <li>• Characteristics of thriving cultures</li> <li>• Learning and influencing culture</li> <li>• Dealing with toxicity</li> <li>• Conflict and dispute resolution</li> </ul>	<p>In development</p>	<p>In person delivery (teachings and practice sessions at 2<sup>nd</sup> residency)</p> <p>Experiential/practice</p>
<p><b>Accountability</b></p> <p>Content:</p> <ul style="list-style-type: none"> <li>• Expectations of accountability in our sector?</li> <li>• Accountability approaches (accreditation, reporting, etc)</li> </ul>	<p>In development</p>	<p>Webinars</p>

<p>Questions:</p> <ul style="list-style-type: none"> <li>• What do I need to know and understand about the shifting and increasing expectations for ‘accountability’ – from personal to program to agency accountability?</li> <li>• How do I manifest ‘accountability’ as a leader?</li> </ul>		
<p><b>The Future of the CSS and NPS sectors</b></p>	<p>In development</p>	

Additionally, it is proposed that a leadership development program incorporate “business basics” - hard skill development as defined by the group as being needed e.g., grant writing, financial management, HR/LR. As the focus remains on leadership, the intention of “business basics” learning would be on ensuring participants have sufficient working knowledge in all areas so that they can be effective managers, and that “they know what they don’t know” and when to seek advice.

**6. Special Topic Learning Streams**

In the spirit of the generative curriculum design approach, the participants identified a desire to deepen their learning in a number of additional areas. It was decided that the following special topic learning streams would be offered, supported by webinars in addition to those regularly scheduled for core learning (approximately one additional every month) as well as self-study materials such as references, contacts, online presentations, workshops and events.

The following special topic learning streams are underway:

**a. Social innovation, enterprise and entrepreneurship:**

- What is social innovation, social enterprise and social entrepreneurship and what does it have to do with community social care and service deliver?
- Social innovation as a leadership mindset
- ‘Eyes wide open’ - Assessing the opportunity and fit for my program/agency/community partnership
- Case studies – opportunities and challenges

**b. Branding and social marketing – programs, agencies and the sector**

- Branding, social marketing, value propositions – what are we talking about and what does it have to do with me, my program, my agency and my sector?
- “Did you know...?” - Baseline information about community social care and how to use this information to support your programs and agencies
- Creating powerful stories – communicating about your work and its impact



- Case examples – engaging community and funders, raising awareness, changing public opinion

### **c. Small agency and rural agency practice leadership**

- “Jack of all trades” leadership – the realities of small agency leadership
- Building community support – leveraging community assets to meet community needs
- Cooperation, collaboration, shared services and partnerships – ways of working with others to enhance agency capacity

### **d. Advocacy and Activism**

- The many faces of advocacy – what have we learned about effective advocacy?
- Social movements and how to build them?
- Speaking truth to power while preserving relationships – building a base of shared understanding with funders and partners

### **e. Inclusive organizations – creating welcoming, diverse and healthy workplaces**

- Welcoming diversity in the workplace
- Xyboom.ca – conference panelists, discussions and conclusion (see YouTube promo: [http://www.youtube.com/watch?v=Cja0\\_3mugH8&feature=player\\_embedded](http://www.youtube.com/watch?v=Cja0_3mugH8&feature=player_embedded))
- Cultural competence and attunement
- Qualities of healthy and diverse workplaces
- Generations in the workplace
- Talent development – building strong teams

### **f. Organizational development and change leadership**

- Characteristics of healthy organizations – and how to be a leader that creates and nurtures one
- Managing and leading change
- Talent development – building strong, resilient and innovative teams
- Training and professional development

## **F. Self Assessment and Planning Tools**

Another deliverable for the LMP funding was to identify and/or develop self-assessment tools to assist *Leadership 2020* participants – or any CSS practitioner interested in developing their leadership capacity – to assess their strengths and assets, and identify areas for leadership development. The underlying belief is that effective leaders are aware of their personal and professional talents, strengths, current knowledge and skill base, and limitations, and are willing to work on continual development. The information they gain enables them to develop an individual development plan that sets out learning goals, knowledge and skill development courses and programs that might be undertaken, and practices, experiences, supervision and mentorship that might be beneficial.

A wide array of proprietary and open source leadership assessment and planning tools were reviewed and compared. Many of the most interesting evidence based/well researched assessment and planning tools were very costly, ranging from \$500 to \$1800 per person which is out of the reach of most NPS agencies. On the other hand, many of the open source tools did not appear to have an evidence or research base so their reliability and validity could not be established.

After reviewing the options and costs, and experimenting internally with several options, the Federation developed and piloted an assessment and planning process that integrates several low cost yet reliable and valid proprietary assessment tools, with a thoughtful planning process. The tools include the Gallup StrengthsFinder assessment, and the complementary CoreClarity assessment that builds on the StrengthsFinder results and provides a more detailed analysis of talents. The former is accessible via the purchase of one of several different books pertaining to strengths-finding that gives the reader access to a code that enables them to complete an online strengths based analysis. CoreClarity assessment (see <http://www.coreclarity.net>) is available from the US based developer or from a BC based leadership consultant that worked with the 2020 participants. Total cost for these assessments is between \$100 and 150 (bulk purchasing assessments lower the costs per person).

The assessments were completed by all *Leadership 2020* participants and a ½-day strengths and talents workshop was conducted at the outset of the residency. The workshop deepened participants' understanding of their own strengths and talents, and how these might be beneficial or challenging in their work. The workshop also addressed how to work with strengths and talents across teams and organizations. The feedback received from participants suggests that the assessment process was interesting and engaging, provided them with valuable insights about their own approach to work, and informed personal learning plans. A key premise underlying the strengths based work is that leaders benefit from building on their strengths and talent, rather than focusing on simply overcoming their deficits.

The attached individual learning plan 'tool kit' builds on the assessments and sets out a process for career visioning, to goal setting, to the development of a learning plan with action steps. What we learned from the testing of this assessment and planning process is that participants benefit a great deal from access to a learning partner, coach or guide as they work through the plan. In the *Leadership 2020* program, the coordinator offered to meet (via telephone or skype) with each participant to have a conversation about their vision, goals and action steps.

## **G. Lessons Learned about Leadership and Executive Development**

The development of the six executive leadership development elements that have been worked on with financial support from the LMP fund (as described above), coupled with the Federation's experience in undertaking the first pilot offering of the *Leadership 2020* program have taught us a number of key lessons that we believe will inform the Employer's Council development of further executive leadership development capacity in the BC non-profit, CSS sector:

1. **Perception of interest:** There is a high level of interest in leadership development amongst mid career professionals in the CSS and NPS field. They have described efforts to access other leadership development opportunities and found what is available to be either not relevant or too

costly to attend. Interestingly, a survey of current Federation leaders revealed that the majority believe that there is little interest amongst their management staff to assume more senior leadership positions. This was contradicted by the program managers and directors themselves in a subsequent survey who indicated that they do aspire to senior leadership positions however a) believe that they are not supported to test out their leadership capacities and b) want to “recreate” what leadership looks like in the sector. The Council may wish to consider what might be done to help current leaders be more receptive to emerging leaders and new approaches to leadership.

2. **Assessment of need for leadership development:** An invitation to staff to participate in the co-creation of *Leadership 2020* met with an enthusiastic response, with twice as many people applying than could be accommodated in the pilot offering for 23 emergent leaders and 8 legacy leaders. However, these applications appear to be just the ‘tip of the iceberg’ in terms of interest in some form of leadership development, as the Federation received a significant number of emails from individuals who wanted to develop their skills and knowledge, but were unable to commit to a longer term program such as *Leadership 2020* due to family or work commitments and/or their agency’s inability to support their participation (see note below). This suggests that an array of choices and options need to be developed in order to meet the needs and the capacity for emerging and current leaders to participate – including short term or ‘one-off’ learning events, online learning, knowledge distribution for self-paced learning, etc. Some of these opportunities are available within the public post secondary institutions and other training bodies that are included in the directory, while other approaches may need to be developed to meet the specific learning needs for, and financial and time constraints of, the CSS sector. One approach that the Federation has launched that shows promise as a tool for self-directed learning is the distribution of “Weekly Leadership Investment” bulletins that include: short discussion on the theme topic for the week; one short leadership reading; one online video for viewing (e.g. TED talk); leadership activities or questions to consider.
3. **Capacity to participate and agency limitations:** To participate in the *Leadership 2020* design process, agencies were only asked to support their staff person with time to participate in the webinars and residencies and some travel costs associated with the residency – there were no fees. Despite this, a significant number of agencies indicated that they would not be able to support their staff to participate due to the lack of funding for professional development and/or the restrictions imposed in their service contracts. There is no provision in many contracts for any staff development time and due to the requirements for a set number of “direct service hours” agencies felt they could not release their staff for any PD activity. This suggests that the contractual requirements may actually impede leadership development in our sector. This has been referred to the Federation and MCFD’s new Balanced Contract Management and Reporting Committee as we believe that it is an unintentional barrier to staff development and engagement. Further, some unionized agencies believe that they cannot support their staff to participate or practice their leadership skills out of fear of union repercussions. This suggests that we need to open up conversations with the unions.

4. **Emergent and Legacy leaders:** The inclusion of emergent and legacy leaders has been very well received not only by the applicants and their agencies, but also by the thought leaders that we have consulted with. This appears to be one of the most promising practices or aspects of the program thus far.
5. **Hybrid delivery model and sustained connection:** The combination of face-to-face and online learning over a longer time frame is particularly appreciated by the participants – they want to have a sustained learning opportunity with their colleagues, that is also affordable and accessible and limits the amount of time that must be taken away from work and family.
6. **Management or leadership skills:** As was noted in the December 2011 progress report, we initially assumed that the executive development program that was needed was more management-skill based. Increasingly boards are looking for “MBA/business skills” in their recruitment efforts due to their concerns about risks and their desire to mitigate risks through management-based action. This is understandable, however, our research and experience to date strongly suggests that this does not reflect views of thought leaders and may not prepare agencies for the complexity of the future. Leadership that weaves together vision, innovation, collaboration and well-informed and thoughtful action is required. In other words, we need leaders who know how to manage, but just as importantly, know how to lead and mobilize the talents of many to get the work done.
7. **Deeper leadership learning:** In point 2 above, it was noted that we will need to develop an array of approaches that engage a broader array of people who are interested in developing their leadership capacity. This is important to ensure that there are multiple accessible opportunities that support ongoing learning and the experience of *Leadership 2020* is teaching us that there is incredible value in the long term learning process that:
  - offers an integrated and expansive program for leadership development;
  - brings leaders together for intensive work and consequently builds a supportive community of practice. This community of practice enables members to safely ‘wrestle’ with leadership challenges and speak truthfully about the difficulties they face as leaders – from how to take the new practices and approaches into their workplace, to how to inspire and support staff that are disengaged, to how to find life work balance, to how to work with ambiguity in the face of expectations to “have the right answer” and “be authoritative”;
  - facilitates connections between the emergent and legacy leaders and other mentors; and
  - builds in time and opportunity to “practice” leadership through team projects and initiatives.
8. **Diversity of participants:** Our pilot offering has engaged a very diverse group of participants from multiple disciplines, job functions, agency sizes, ages and developmental stages, cultural backgrounds, communities and regions of province. This has been a strength as it has facilitated interdisciplinary coaching, openness to diverse perspectives, and expansion of relationships. If we are living in an interconnected world, facing complex issues and challenges then our relationships need to extend beyond our agency or discipline or community. Leaders and managers can’t possibly know everything that there is to know about doing their job. The premise is that effective leaders and managers know what they don’t know, know when they need counsel or assistance,

and know how to ask for assistance with respect and clarity. Ensuring diversity of people within the learning cohort enhances participants' opportunity to practice seeking out support and new perspectives and ideas as well as working on teams.

9. **Creating the fertile ground for leadership learning to take root in the workplaces:** We learned that it is not sufficient to just offering leadership learning to participants; we need to “till the soil” to ensure that agencies and workplaces open up to and support the learner. The following is being tested in the Leadership 2020 pilot:
- Working with the directors and ED's of the participants: informing them about what is underway, sharing information about future leadership and engaging them to support their people in taking ideas back into their workplaces.
  - Sector leaders (beyond those directly engaged in the 2020 program): how do we help sector leaders support their staff's development and create “magnetic workplaces”; how do we help them keep the doors open for “positive recruitment” and recognize that they are part of a broader sector workforce and a broader recruitment and retention agenda.
  - Informing the Boards (engaging through Board Voice Society as well as the participant's boards); what might they need in the future and why (important qualities to be looking for).
  - Designing Federation workshops and meetings with emergent leadership in mind to create opportunities for them to build their network and practice their leadership skills e.g., as hosts for table talks and open spaces or world cafés.
  - Connecting with HSD Deans and Directors Council re: CSS leadership and interdisciplinarity stream in undergraduate education; programs co-taught with sector leaders; advanced standing for post-degree certificate, diploma or degree.
  - Actions to be taken:
    - Survey EDs and board directors as current and potential recruiters and employers about what they think is called for in the leaders that they will hire in the future (reality check)

## H. Summary

The learning through this design and development process has been significant and a much clearer sense of what the leaders in our sector need and how it might be effectively delivered has emerged. The Federation trusts that the results of the work undertaken with the assistance of the LMP and other funding will save other parties design and development time and resources, and will stimulate the development of an array of leadership development opportunities within our sector. We are confident that we have identified many of the most important components for executive/leadership development – and effective ways to teach and communicate these components - and we hope that they will be adopted and tailored throughout the sector. This process is an illustration of the social innovation and prototyping that is being called for in the non-profit sector and the Council will be able to share the results to support the “scaling up and out” of promising practices.

Should the Council have any questions or wish to learn more about what has been learned, what we would recommend as next steps in leadership development, or if the members require additional information they are welcome to contact us.

We appreciate having received the LMP funding and the opportunity to contribute to leadership development resources for the community social care and non-profit sector in BC.

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## Budget and Expenditures

<b>Work Plan Element #1 – Inventory of leadership related courses in post secondary institutions</b>		
<b>Item</b>	<b>LMP Budget request</b>	<b>Expenditures - Actual</b>
Professional Services	\$3600	\$3080
Expenses – telecommunications (webinars and long distance)	\$100	\$150
Travel – 1 meeting with HSD Deans and Directors, Fall 2011	\$280	\$350
<b>Work Plan Element #2 – Revised inventory of leadership training</b>		
Professional Services	\$1440	\$1120
Expenses – telecommunications (webinars and long distance)	\$50	\$100
<b>Work Plan Element #3 – Online inquiry</b>		
Professional Services	\$3000	\$3500
Expenses - Webinars	\$240	\$150
<b>Work Plan Element #4 – Think tank (1 day proposed; increased to two days)</b>		
Professional Services and Honoraria	\$4000	\$3640
Expenses – Meeting room and refreshments	\$320	\$360
Travel – Based in lower mainland; 6 participants travelling	\$600	\$2100
<b>Work Plan Element #5 – Assessment tools</b>		
Professional Services	\$720	\$3800
<b>Work Plan Element #6 – Program Design</b>		
Professional Services	\$12000	\$16800
Expenses – resources and reference material	\$500	\$300
Other - contribution to development of portal	\$500	\$500
<b>Totals</b>	<b>\$27,350</b>	<b>\$35,950</b>

Note: In kind contributions ranging from provision of meeting spaces to professional time given by advisors and designers valued at \$6300

# **Individual Development Plan**

## **Self Study Guide**

**Leadership 2020**

**2011/2012**



## INTRODUCTION

This study guide outlines a step by step process for creating an Individual Development Plan (IDP). The document includes:

- Frequently asked questions about IDPs
- Questions to ponder about what's important to you
- Four steps to create an IDP
- Assessments to help you identify where to focus your attention as you develop your IDP

### How to Use This Study Guide

This is a self-study program for those who want to write an IDP but don't know where to begin. It includes assessments and worksheets for you to complete as you work through each of the four steps to completing an IDP.

The exercises in this study guide serve to move you from traditional ways of thinking and engage you in more innovative, creative thinking. By completing the exercises, you may discover a world of possibilities that never before occurred to you.

In order to complete this workbook, you will also need the following items:

- *WorkStyle Profile (WSP)* Online Questionnaire. The link will be emailed to you.
- *Campbell Leadership Descriptor (CLD)* Participant Workbook and Questionnaire, included in your Leadership 2020 Welcome Packet

We encourage you to take your time answering the questions and completing the worksheets and exercises. You can expect to spend approximately 3 to 5 hours completing this program, including the WSP and CLD exercises.

When you have completed a learning experience, make sure you record it. The Individual Training Record in Appendix G is a great way to record the development experiences as you complete them.

## FREQUENTLY ASKED QUESTIONS ABOUT INDIVIDUAL DEVELOPMENT PLANS

**Q.** *What is the purpose of an Individual Development Plan?*

**A.** Development plans are formal or informal plans to help you maintain or enhance the skills and knowledge needed to do your current job or other jobs. Development plans provide:

- A roadmap to success
- Motivation to move ahead in your career
- Goals to strive towards
- A vehicle for providing feedback
- A means of coaching and mentoring

**Q.** *Is my Individual Development Plan the same as my Employee Performance Review (EPR)?*

**A.** A development plan is designed to develop new skills, improve on existing skills, and help people grow. An EPR is designed to assess an employee's job performance. Development planning is employee driven and management supported. Items on development plans should help the employee and the organization achieve objectives.

**Q.** *Why do I need an Individual Development Plan?*

**A.** Because the business environment is changing more and more rapidly, skilled and productive workers' jobs will change significantly in the future. Having a development plan will help you be prepared. Identifying your values and interests, and enhancing your transferable skills will make you more marketable as the employment landscape changes. Your development plan will provide a roadmap to get you to the next level in your career, taking you on a more intentional and strategic route.

**Q.** *How is an Individual Development Plan different from an Individual Learning Plan? I've seen many different formats.*

**A.** Most people use the two terms interchangeably. For the purposes of this self study guide, Individual Development Plans and Individual Learning Plans refer to the same process. We chose "Individual Development Plan" to emphasize the idea that developing ourselves is an active and purposeful, performance-based activity; whereas "learning" is commonly understood to mean *study*, which generally places less emphasis on active practice.

## PREPARING TO COMPLETE YOUR INDIVIDUAL DEVELOPMENT PLAN (IDP)

### Questions to Ponder

Answering these questions will help you complete the four-step process to create your development plan.

1. If you could have any job, what would you choose? Are you actively pursuing it?
2. When was the last time you felt really passionate about your work? Why?
3. What do you enjoy most about your current job or work in general? (Consider things you have enjoyed in the past.) What do you enjoy least?
4. What is the best career decision you've ever made? What made it the best?
5. If you could learn something new, what would it be?

Now that you've answered some very important questions about what is important to you in your work, you're ready to begin writing your development plan. Turn to page 5 for an overview of the four step process you will use to complete your IDP.

## YOUR DEVELOPMENT PLAN IN FOUR EASY STEPS

### Step 1: Identify your values and work style

- Complete the “Defining Your Values Worksheet” and choose three values for further development
- Complete the WorkStyle Profile online questionnaire and workbook, and identify your work style strengths and challenges

### Step 2: Assess your strengths and areas of development

- Complete the Campbell Leadership Descriptor questionnaire and workbook, and identify your Leadership Strengths and Blind Spots
- Complete the “Competencies Worksheet” and identify your Competencies
- Review with your supervisor, mentor or coach

### Step 3: Map out a plan

- Assess your current position
- Choose your direction

### Step 4: Write your development plan

- Define your current state
- Define your desired state
- Take action
- Seek feedback and support
- Reflect on what happens
- Determine your next steps

## Step 1: Identify your values and work style

### Part A – Defining your values

Have you ever taken the time to clearly define your values to yourself and honestly ask yourself how you plan to live your life built on those values? Do you consciously know what your values are? The goal of this exercise is to help you align your life with your values. You will write positive clarifying statements about yourself and your values to help you define your values and to gain clarity about what is most important to you, both in your work and personal life.

Everyone has their own list of values that are most important to them. We call them our *governing values*. However, our interpretations of values may not be exactly the same. For example, integrity might mean to you, “I always tell the truth,” and to somebody else it might mean, “My actions are consistent with my words.” Therefore, it is important that you develop a list that clearly articulates your personal values to bring clarity and purpose to your IDP.

When you write clarifying statements, be sure to use positive terms, such as *I am, I do, I will*. Even if it is something you don’t always do, you may consider writing it down as something you strive toward.

### Instructions

*Think about the values that are most important to you – for example, integrity, respect, family, humour – and use the worksheet in Appendix A to write them down and articulate what they mean to you.*

Possible values could include, but are not limited to:

Authenticity	Family	Diversity
Transparency	Career	Loyalty
Honesty	Balance	Fairness
Integrity	Simplicity	Service
Courage	Patience	Humour
Respect	Education	Security
Spirituality	Volunteerism	Autonomy
Risk-taking	Community	Collaboration

As you complete this exercise ask yourself, “*Do my actions reflect my intentions?*”

## **Part B – WorkStyle Profile (WSP)**

In today's world of constant access and fast-paced lives, everyone struggles with finding the best way to manage their energy and time. What works well for someone else may not work well for you. Identifying your work style will help you better understand your approach to managing boundaries and move toward more productive and sustainable ways of managing your time and energy.

WorkStyle Profile is a self-assessment that measures how you manage the boundaries between work and the rest of your life. Results from the assessment will provide you with the foundation for understanding your choices and the trade-offs related to managing the boundaries between work and family. The term "family" is used broadly to include traditional family members as well as close friends and others. WorkStyle Profile is not an assessment of your skill, but rather a picture of your behaviours and priorities.

### **Instructions**

By now, you should have received an email invitation to complete the WorkStyle Profile Assessment. After you complete the questionnaire, a report that explains how to interpret the results of your assessment will be emailed to you within 5 business days. The report also includes a "Development Planning Guide," to help you identify the things you want to change about the way you manage the boundaries between work and family.

We encourage you to complete the exercises in the Development Planning Guide and to seek support from family members, colleagues, friends, a mentor or coach, and seminars or classes.

## Step 2: Assess your strengths and areas of development

### Part A – Campbell’s Leadership Descriptor (CLD)

For people to develop their leadership skills and abilities, they must first be able to recognize their strengths and identify areas in which they would like to improve. The *Campbell Leadership Descriptor* was developed to use for situations in which “self versus others” analysis of leadership characteristics would be useful, such as leadership development courses and seminars, and one-on-one coaching.

Development of the Descriptors was guided by two principles:

1. *Universality*: the desire for a universal list of leadership components applicable to leaders at every type of organization
2. *Simplicity*: the desire to have a list available in a format that would make it easy for participants to compare themselves systematically with others on essential leadership components.

The Descriptor was designed to allow participants to work on their own to fill out the questionnaire, score it, and draw their own conclusions from the results. However, we encourage you to involve others in the process. Although self-reflection can provide a powerful learning experience, feedback can help us make sure that our view of our own strengths and weaknesses is in sync with what others see in us.

The major purpose of the Descriptor is to create a structured discussion about the important components of leadership. The Participant Workbook focuses on three specific goals:

1. To acquaint participants with the major components of leadership
2. To encourage participants to think about what it takes to accomplish each of the leadership components – in other word to ask “How do others do it? What Works?”
3. To help participants identify specific actions that can strengthen their leadership effectiveness by asking, “What do I do next?”

## Instructions

You should have received the *Campbell Leadership Descriptor Participant Workbook* in your *Leadership 2020 Welcome Packet*. Take time to familiarize yourself with the nine components of the Descriptor, which are described on pages 9-11 of the CLD workbook:

1. Vision
2. Management
3. Empowerment
4. Diplomacy
5. Feedback
6. Entrepreneurialism
7. Personal Style
8. Personal Energy
9. Multicultural Awareness

Pages 34-37 of the workbook also offer a good overview of “Frequently Asked Questions and Their Answers,” which provides information about how and why the leadership components were developed, and other guidance about methodology and using the instrument.

Since your scores might change overtime as you develop new leadership skills and abilities, we recommend that you make copies of the questionnaire for your own use, so you can re-evaluate the descriptors at a later time. You may also consider asking colleagues to fill out the questionnaire regarding your leadership to give you a well-rounded picture of your leadership strengths and opportunities for development. This may help you answer the questions in the Participant Workbook more honestly and to create a more powerful action plan that is based on concrete feedback from the people you work with everyday.

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1.

## Part B – Practical Competencies

*"Management is efficiency in climbing the ladder of success; leadership determines whether the ladder is leaning against the right wall."* - Stephen R. Covey

Now that you have completed the CLD assessment, you should have a better understanding of your strengths as a leader. Leaders must be able produce constructive change by establishing a direction, gaining commitment to a vision, and motivating and inspiring people. And they must also be able to *manage* the vision by producing consistency through planning, budgeting, organizing, and aligning people and resources. Therefore practical competencies are an essential component of your IDP.

Competencies are a set of knowledge, skills, and expertise that enable an individual to perform a job. Competencies are often defined by a set of clarifying statements about behaviours and tasks. These statements provide a structured guide to identify, evaluate, and develop knowledge, skills, and expertise. Sector research and results from the Leadership 2020 Survey revealed nine competencies that are generally believed to determine an individual's success in leadership positions in the community social services sector. The competencies include:

- Business Acumen
- Strategic Planning
- Financial Management
- Legal/Governance
- Marketing
- Fundraising
- Grant Writing
- Human Resources and Labour Relations
- Program Evaluation

Although the items in this list are all important, some may be more important than others, depending on the nature of the position. For example, understanding grant writing might have little to no importance to an HR manager, so it might be marked as a low priority competency or removed from the list altogether. Similarly, the actual level of competence required to successfully perform a role might vary. For example, at a larger organization that has a Chief Financial Officer or a Director of HR, the Executive Director might need to understand what activities are involved in performing the competency, but might not necessarily need to be able to perform the competency to achieve stated results.

It's important to note that the list of 9 competencies is not exhaustive, and organizations may want to choose competencies that are more relevant to their organizational goals, structures, cultures, etc. Furthermore, as noted above, it might be appropriate to remove competencies that are not relevant to the specified role.

### Instructions

Think about your next position or role. Will it be with your current organization? What is required to successfully perform the job? Who might you talk to about this position? We suggest that you consult with any or all of the following people to complete this exercise:

- The person currently performing the role
- A person performing a similar role at your organization or a similar organization
- Your supervisor or manager
- A coach or mentor

Use the worksheet in Appendix B to guide your conversation in the following order:

**1:** Review and refine the list of competencies to make sure that it accurately reflects the role's requirements. You may delete or add competencies. You may also want to refine the list of tasks and behaviours that define each competency. We recommend that you use no more than 4 descriptive statements to illustrate a competency's tasks or behaviours.

**2:** Rate how important each competency is to performing the specified role successfully. The following scale is provided: Critical, High, Medium, Low.

**3:** Rate the level of competence required to successfully perform the role, using the following scale of competency levels:

1. I am not familiar with the competency
2. I understand what activities are involved in performing the competency
3. I am able to perform the competency and achieve the stated results with assistance
4. I am able to perform the competency without assistance and achieve the stated results

**4:** Rate your current level of competence using the same scale as the previous step.

**5:** Use the comments section to identify strengths and development needs. You may also note developmental activities and ideas.

### **Step 3: Map out a plan**

Now that you've thought about your values, work style, leadership strengths, and practical competencies, you are ready to map out a plan.

#### **Part A – Assess your current position**

Begin the process by answering the following questions:

- Where will development add the greatest value to my performance?
- What am I most willing to work on now?
- What skills or behaviours could I develop or leverage?

Complete the table provided in Appendix C to summarize your findings from the assessments that you completed about your values, work style, leadership strengths, and practical competencies. What did you learn about yourself?

#### **Part B – Choose your direction**

Once you've summarized your strengths and opportunities for development, you should have a better sense of the direction you would like to go with your IDP. Complete the checklist in Appendix D to help you determine where you would like to focus your energy.

Remember, sometimes it's more effective to focus your energy on cultivating your strengths, rather than working only on areas that you consider to be weaknesses. You may discover that your energy is better spent focusing on things that you are most passionate about.

## **Step 4: Write your Individual Development Plan**

Now that you have mapped out where you would like to go, it is time to create your development plan. To begin, choose one development goal that you identified in Appendix C and use the IDP template in Appendix E to create a plan. The template provides a framework with six steps that will drive your development and establish a cycle of continuous learning.

1. Define your current state
2. Define your desired state
3. Take action
4. Seek feedback and support
5. Reflect on what happens
6. Determine your next steps

After you complete the final step, cycle back to the beginning to focus on your next priority for learning. Soon, this will become a natural, automatic process that will take your learning and development to the next level.

### **Tips:**

1. Select goals that are important to you and to your organization, so you will have plenty of opportunity to work on them. Not only will you be more likely to receive the support you need, but you will see the kind of progress that will sustain your development efforts.
2. Stay focused on your mission. Your goals will likely evolve over time. Don't let shifting opportunities distract you. Since you know that you will continue to work on new goals, address only one or two at a time.
3. Make development activities a part of your daily routine. Since you are already busy, focus on opportunities with high change potential. Appendix E provides a check list for you to record your ideas for development activities.
4. Seek feedback that is relevant to your development goals. Think about what kind of information will be helpful and who can provide you with that information. Let people know what kind of feedback you need and get input from a variety of sources to get a more complete picture.
5. Be curious. Assume that everything is a learning opportunity. There might be a free gift of learning hidden inside your daily experiences. Be open and alert to the unexpected.

## **CONCLUSION**

Congratulations! You have just completed your Individual Development Plan. At this point, you may be wondering, “What do I do now?” Below are some tips to help you turn your IDP into a reality:

### **Set up a system to follow up on your IDP.**

If you use a planner or desk calendar, write yourself a reminder to review your progress toward reaching the goals you set down on your IDP. If you listed “April 2012” as a review date for one of your action steps, you may want to jot down on April 1, “Review IDP progress.”

### **Incorporate the action steps from your IDP into your daily or weekly planning.**

Since development is a gradual process, you will be more likely to see results if you break down your action plan into smaller steps that can be completed daily or weekly. For example, if you wrote on your IDP, “Learn conversational Russian,” you may want to incorporate into your daily routine an activity related to that goal. On your daily to do list, you might write, “Listen to Russian CD for 15 minutes.”

### **Share your IDP with someone else.**

Your supervisor is a great resource to help you meet your IDP goals. If you are uncomfortable sharing your IDP with your supervisor, perhaps a mentor or peer you respect could read it and provide you with feedback about your progress.

### **Keep a copy of your IDP at home.**

It’s easy to forget about your professional development goals when they’re not right in front of you. You might consider keeping a copy of your IDP at home so you may review it when you are not at work. Not all IDP activities will take place at work, so it can be helpful to review your goals when you have some down time.

**APPENDICES**

[Appendix A – Clarifying Your Values Worksheet](#) .....16

[Appendix B – Competencies Worksheet](#) .....18

[Appendix C – Assess your current position](#) .....24

[Appendix D – Choose your direction](#) .....25

[Appendix E – Development Activities](#) .....26

[Appendix F – IDP Template](#).....27

[Appendix G – Individual Training Record](#) .....30

### Appendix A – Clarifying Your Values Worksheet

<b>Sample Value:</b>	<i>Professionalism</i>
<b>Clarifying Statement(s):</b>	I consistently do excellent work
	I am a team player
	I value the perspectives of others
	I have a positive attitude
	I do what I say I will do
<b>Value:</b>	
<b>Clarifying Statement(s):</b>	
<b>Value:</b>	
<b>Clarifying Statement(s):</b>	
<b>Value:</b>	
<b>Clarifying Statement(s):</b>	





<b>Value:</b>
<b>Clarifying Statement(s):</b>
<b>Value:</b>
<b>Clarifying Statement(s):</b>
<b>Value:</b>
<b>Clarifying Statement(s):</b>
<b>Value:</b>
<b>Clarifying Statement(s):</b>

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## Appendix B – Competencies Worksheet

Organization:	
Position/Role:	
Date of Assessment:	

<b>1. Business Acumen:</b> The ability to manage all aspects of a business so that it runs smoothly; this includes interpreting external market factors and the interrelationships of many internal forces such as people, financial and administrative			
<b>Importance:</b> Critical <input type="checkbox"/> High <input type="checkbox"/> Medium <input type="checkbox"/> Low <input type="checkbox"/>			
Tasks/Behaviours	Current Competency Level	Required Competency Level	Comments on Strengths/Development Needs
Provides a “big picture” understanding of the business	1 <input type="checkbox"/> 2 <input type="checkbox"/> 3 <input type="checkbox"/>	1 <input type="checkbox"/> 2 <input type="checkbox"/> 3 <input type="checkbox"/>	
Demonstrates analytical and problem-solving capabilities	1 <input type="checkbox"/> 2 <input type="checkbox"/> 3 <input type="checkbox"/>	1 <input type="checkbox"/> 2 <input type="checkbox"/> 3 <input type="checkbox"/>	
Utilizes and balances information about business drivers and trends such as revenue, costs, client needs, and short- and long-term needs to guide activities	1 <input type="checkbox"/> 2 <input type="checkbox"/> 3 <input type="checkbox"/>	1 <input type="checkbox"/> 2 <input type="checkbox"/> 3 <input type="checkbox"/>	
	4 <input type="checkbox"/>	4 <input type="checkbox"/>	

	1 <input type="checkbox"/>	1 <input type="checkbox"/>	
	2 <input type="checkbox"/>	2 <input type="checkbox"/>	
	3 <input type="checkbox"/>	3 <input type="checkbox"/>	

**2. Strategic Planning:** The ability to develop and drive a shared understanding of a long-term vision that incorporates people’s input and describes what the organization needs to look like and how it needs to operate in the future

**Importance:** Critical  High  Medium  Low

Tasks/Behaviours	Current Competency Level	Required Competency Level	Comments on Strengths/Development Needs
Identifies and pursues challenges that result in long-term benefits for stakeholders	1 <input type="checkbox"/>	1 <input type="checkbox"/>	
	2 <input type="checkbox"/>	2 <input type="checkbox"/>	
	3 <input type="checkbox"/>	3 <input type="checkbox"/>	
Demonstrates how priorities fit into the organization’s overall strategies	1 <input type="checkbox"/>	1 <input type="checkbox"/>	
	2 <input type="checkbox"/>	2 <input type="checkbox"/>	
	3 <input type="checkbox"/>	3 <input type="checkbox"/>	
Allocates resources based on strategies and stated objectives	1 <input type="checkbox"/>	1 <input type="checkbox"/>	
	2 <input type="checkbox"/>	2 <input type="checkbox"/>	
	3 <input type="checkbox"/>	3 <input type="checkbox"/>	
Ensures that accountabilities and expectations for executing the plan are clear	1 <input type="checkbox"/>	1 <input type="checkbox"/>	
	2 <input type="checkbox"/>	2 <input type="checkbox"/>	
	3 <input type="checkbox"/>	3 <input type="checkbox"/>	

**3. Financial Management:** The ability to understand and analyse financial information and take appropriate action; for example, this may be to improve revenue, reduce costs, create and/or manage a project or program budget, etc.

**Importance:** Critical  High  Medium  Low

Tasks/Behaviours	Current Competency Level	Required Competency Level	Comments on Strengths/Development Needs
Creates and manages budgets	1 <input type="checkbox"/>	1 <input type="checkbox"/>	
	2 <input type="checkbox"/>	2 <input type="checkbox"/>	
	3 <input type="checkbox"/>	3 <input type="checkbox"/>	
Interprets financial statements to make sound business decisions	1 <input type="checkbox"/>	1 <input type="checkbox"/>	
	2 <input type="checkbox"/>	2 <input type="checkbox"/>	
	3 <input type="checkbox"/>	3 <input type="checkbox"/>	
Manages processes and systems to ensure fiscal and legal compliance	1 <input type="checkbox"/>	1 <input type="checkbox"/>	
	2 <input type="checkbox"/>	2 <input type="checkbox"/>	
	3 <input type="checkbox"/>	3 <input type="checkbox"/>	

Ensures that the team/organization gets the best value within budget constraints	1 <input type="checkbox"/>	1 <input type="checkbox"/>	
	2 <input type="checkbox"/>	2 <input type="checkbox"/>	
	3 <input type="checkbox"/>	3 <input type="checkbox"/>	

**4. Legal/Governance:** The ability to ensure the systems and processes of the organization are run effectively and that they comply with legislation; the ability to interpret rules and make sure they are applied in a systematic and consistent manner

<b>Importance:</b> Critical <input type="checkbox"/> High <input type="checkbox"/> Medium <input type="checkbox"/> Low <input type="checkbox"/>			
Tasks/Behaviours	Current Competency Level	Required Competency Level	Comments on Strengths/Development Needs
Implements procedures to independently verify and safeguard the integrity of the organization's financial reporting	1 <input type="checkbox"/>	1 <input type="checkbox"/>	
	2 <input type="checkbox"/>	2 <input type="checkbox"/>	
	3 <input type="checkbox"/>	3 <input type="checkbox"/>	
Maintains up-to-date knowledge of the organization's affairs and the governance process	1 <input type="checkbox"/>	1 <input type="checkbox"/>	
	2 <input type="checkbox"/>	2 <input type="checkbox"/>	
	3 <input type="checkbox"/>	3 <input type="checkbox"/>	
Identifies, assesses and remediates risks associated legal and regulatory compliance	1 <input type="checkbox"/>	1 <input type="checkbox"/>	
	2 <input type="checkbox"/>	2 <input type="checkbox"/>	
	3 <input type="checkbox"/>	3 <input type="checkbox"/>	
	1 <input type="checkbox"/>	1 <input type="checkbox"/>	
	2 <input type="checkbox"/>	2 <input type="checkbox"/>	
	3 <input type="checkbox"/>	3 <input type="checkbox"/>	

**5. Marketing:** The ability to promote a organization effectively with the use of advertising, media and PR

<b>Importance:</b> Critical <input type="checkbox"/> High <input type="checkbox"/> Medium <input type="checkbox"/> Low <input type="checkbox"/>			
Tasks/Behaviours	Current Competency Level	Required Competency Level	Comments on Strengths/Development Needs
Clearly and consistently articulates the organization's contribution to stakeholders, clients, and the community	1 <input type="checkbox"/>	1 <input type="checkbox"/>	
	2 <input type="checkbox"/>	2 <input type="checkbox"/>	
	3 <input type="checkbox"/>	3 <input type="checkbox"/>	
Focuses on the external environment to understand and anticipate community needs	1 <input type="checkbox"/>	1 <input type="checkbox"/>	
	2 <input type="checkbox"/>	2 <input type="checkbox"/>	
	3 <input type="checkbox"/>	3 <input type="checkbox"/>	

Identifies and pursues opportunities for strategic partnerships and collaboration to offer innovative, relevant, and timely services	1 <input type="checkbox"/>	1 <input type="checkbox"/>
	2 <input type="checkbox"/>	2 <input type="checkbox"/>
	3 <input type="checkbox"/>	3 <input type="checkbox"/>
Implements marketing strategies to ensure brand compliance, and consistent internal and external communication	1 <input type="checkbox"/>	1 <input type="checkbox"/>
	2 <input type="checkbox"/>	2 <input type="checkbox"/>
	3 <input type="checkbox"/>	3 <input type="checkbox"/>

<b>6. Fundraising:</b> The ability to develop a compelling case for support by involving volunteers, staff, and other groups in order to communicate the rationale for supporting the organization's fundraising program			
<b>Importance:</b> Critical <input type="checkbox"/> High <input type="checkbox"/> Medium <input type="checkbox"/> Low <input type="checkbox"/>			
<b>Tasks/Behaviours</b>	<b>Current Competency Level</b>	<b>Required Competency Level</b>	<b>Comments on Strengths/Development Needs</b>
Initiates and strengthens relationships with all constituents through a systematic plan designed to increase support of the organization over the long term	1 <input type="checkbox"/>	1 <input type="checkbox"/>	
	2 <input type="checkbox"/>	2 <input type="checkbox"/>	
	3 <input type="checkbox"/>	3 <input type="checkbox"/>	
	4 <input type="checkbox"/>	4 <input type="checkbox"/>	
Informs constituents about the value of giving and promotes a culture of philanthropy	1 <input type="checkbox"/>	1 <input type="checkbox"/>	
	2 <input type="checkbox"/>	2 <input type="checkbox"/>	
	3 <input type="checkbox"/>	3 <input type="checkbox"/>	
	4 <input type="checkbox"/>	4 <input type="checkbox"/>	
Designs and implements short-and long-term fundraising plans and budgets	1 <input type="checkbox"/>	1 <input type="checkbox"/>	
	2 <input type="checkbox"/>	2 <input type="checkbox"/>	
	3 <input type="checkbox"/>	3 <input type="checkbox"/>	
	4 <input type="checkbox"/>	4 <input type="checkbox"/>	
	1 <input type="checkbox"/>	1 <input type="checkbox"/>	
	2 <input type="checkbox"/>	2 <input type="checkbox"/>	
	3 <input type="checkbox"/>	3 <input type="checkbox"/>	
	4 <input type="checkbox"/>	4 <input type="checkbox"/>	

**7. Grant Writing:** The ability to generate revenue for client programs and services through timely submission of well-researched, well-written, and well-documented grant proposals

**Importance:** Critical  High  Medium  Low

Tasks/Behaviours	Current Competency Level	Required Competency Level	Comments on Strengths/Development Needs
Synthesizes complex and diverse data, complemented by intuition, experience, and research, to generate coherent and meaningful proposals	1 <input type="checkbox"/> 2 <input type="checkbox"/> 3 <input type="checkbox"/> 4 <input type="checkbox"/>	1 <input type="checkbox"/> 2 <input type="checkbox"/> 3 <input type="checkbox"/> 4 <input type="checkbox"/>	
Writes clearly and informatively, presenting numerical data effectively, and adapting writing style to the audience	1 <input type="checkbox"/> 2 <input type="checkbox"/> 3 <input type="checkbox"/> 4 <input type="checkbox"/>	1 <input type="checkbox"/> 2 <input type="checkbox"/> 3 <input type="checkbox"/> 4 <input type="checkbox"/>	
Ensures that the budget accurately reflects the elements of the grant proposal	1 <input type="checkbox"/> 2 <input type="checkbox"/> 3 <input type="checkbox"/> 4 <input type="checkbox"/>	1 <input type="checkbox"/> 2 <input type="checkbox"/> 3 <input type="checkbox"/> 4 <input type="checkbox"/>	
Investigates potential funding sources to ensure that grant proposals are submitted to the most appropriate funders	1 <input type="checkbox"/> 2 <input type="checkbox"/> 3 <input type="checkbox"/> 4 <input type="checkbox"/>	1 <input type="checkbox"/> 2 <input type="checkbox"/> 3 <input type="checkbox"/> 4 <input type="checkbox"/>	

**8. Human Resources and Labour Relations:** Ability to align the supply of skilled and qualified individuals and the capabilities of the current workforce, with the organization's ongoing and future plans and requirements

**Importance:** Critical  High  Medium  Low

Tasks/Behaviours	Current Competency Level	Required Competency Level	Comments on Strengths/Development Needs
Maintains awareness of and compliance with federal, provincial, and local labour and employment laws	1 <input type="checkbox"/> 2 <input type="checkbox"/> 3 <input type="checkbox"/>	1 <input type="checkbox"/> 2 <input type="checkbox"/> 3 <input type="checkbox"/>	

Builds partnerships across the organization to support the best possible labour-management outcomes	1 <input type="checkbox"/>	1 <input type="checkbox"/>
	2 <input type="checkbox"/>	2 <input type="checkbox"/>
	3 <input type="checkbox"/>	3 <input type="checkbox"/>
Understands, applies, and supports best practices in HR/LR management	1 <input type="checkbox"/>	1 <input type="checkbox"/>
	2 <input type="checkbox"/>	2 <input type="checkbox"/>
	3 <input type="checkbox"/>	3 <input type="checkbox"/>
	1 <input type="checkbox"/>	1 <input type="checkbox"/>
	2 <input type="checkbox"/>	2 <input type="checkbox"/>
	3 <input type="checkbox"/>	3 <input type="checkbox"/>

<b>9. Program Evaluation:</b> The ability to utilize various approaches to community program evaluation to design an appropriate evaluation plan for a specific program and purpose that meets applicable professional, regulatory, and ethical standards			
<b>Importance:</b> Critical <input type="checkbox"/> High <input type="checkbox"/> Medium <input type="checkbox"/> Low <input type="checkbox"/>			
<b>Tasks/Behaviours</b>	<b>Current Competency Level</b>	<b>Required Competency Level</b>	<b>Comments on Strengths/Development Needs</b>
Specifies the evaluation questions, data sources, data collection and analysis methods,  and procedures for conducting an evaluation study and reporting results	1 <input type="checkbox"/>	1 <input type="checkbox"/>	
	2 <input type="checkbox"/>	2 <input type="checkbox"/>	
	3 <input type="checkbox"/>	3 <input type="checkbox"/>	
	4 <input type="checkbox"/>	4 <input type="checkbox"/>	
Identifies resources for evaluation, such as information, expertise, personnel, instruments, etc.	1 <input type="checkbox"/>	1 <input type="checkbox"/>	
	2 <input type="checkbox"/>	2 <input type="checkbox"/>	
	3 <input type="checkbox"/>	3 <input type="checkbox"/>	
	4 <input type="checkbox"/>	4 <input type="checkbox"/>	
Selects the most appropriate evaluation approaches for the purpose of the evaluation	1 <input type="checkbox"/>	1 <input type="checkbox"/>	
	2 <input type="checkbox"/>	2 <input type="checkbox"/>	
	3 <input type="checkbox"/>	3 <input type="checkbox"/>	
	4 <input type="checkbox"/>	4 <input type="checkbox"/>	
	1 <input type="checkbox"/>	1 <input type="checkbox"/>	
	2 <input type="checkbox"/>	2 <input type="checkbox"/>	
	3 <input type="checkbox"/>	3 <input type="checkbox"/>	
	4 <input type="checkbox"/>	4 <input type="checkbox"/>	



10.

Importance:      Critical       High       Medium       Low

Tasks/Behaviours	Current Competency Level	Required Competency Level	Comments on Strengths/Development Needs
	1 <input type="checkbox"/> 2 <input type="checkbox"/> 3 <input type="checkbox"/>	1 <input type="checkbox"/> 2 <input type="checkbox"/> 3 <input type="checkbox"/>	
	1 <input type="checkbox"/> 2 <input type="checkbox"/> 3 <input type="checkbox"/>	1 <input type="checkbox"/> 2 <input type="checkbox"/> 3 <input type="checkbox"/>	
	1 <input type="checkbox"/> 2 <input type="checkbox"/> 3 <input type="checkbox"/>	1 <input type="checkbox"/> 2 <input type="checkbox"/> 3 <input type="checkbox"/>	
	1 <input type="checkbox"/> 2 <input type="checkbox"/> 3 <input type="checkbox"/>	1 <input type="checkbox"/> 2 <input type="checkbox"/> 3 <input type="checkbox"/>	



## Appendix C – Assess your current position

<b>Values</b>	<b>Strongest Values:</b>	<b>Values I would like to develop further:</b>
	1.	1.
	2.	2.
	3.	3.

<b>Work Style</b>	<b>Work style strengths:</b>	<b>Work style challenges:</b>
	1.	1.
	2.	2.
	3.	3.

<b>Leadership</b>	<b>Leadership strengths</b>	<b>Leadership blind spots</b>
	1.	1.
	2.	2.
	3.	3.

<b>Competencies</b>	<b>Strongest Competencies</b>	<b>Competencies to develop further</b>
	1.	1.
	2.	2.
	3.	3.

## Appendix D – Choose your direction

Select one item per line. Your answers to these questions will determine what you focus on in your development plan.

Do I want to:

1.  develop strengths or  work on areas of growth?
2.  increase skills in my current job or  pursue other opportunities?

If you find it difficult to make the above choices, consider answering the questions from the following checklist to help you align your development plan with your values, skills, and work style.

### ***Key Considerations:***

- How confident am I in my ability to succeed at my current position?
- What skills would I need to strengthen in order to be successful?
- Does my current position make effective use of my knowledge and skills?
- If I were to pursue my dream career, what new skills would I need to succeed?
- Am I prepared to make the commitment necessary in order to reach my dream career?
- Would alternative work arrangements make my current position more attractive to me?
- If I am satisfied with my current position, how can I grow within it?
- If I am considering pursuing other opportunities, how will that move steer me directly or indirectly toward my long-range career goals?

Once you have answered these questions, assess questions 1 & 2 again.

## Appendix E – Development Activities

Once you've chosen where to focus your energy, you may consider a variety of development activities. Development is much more than attending training events. Challenges and "stretch assignments" often add the most value. For future reference, place a check mark next to the activities you are most likely to include in your IDP. If none of these apply, write down other ideas that you might consider.

- |   |  |
|---|--|
| <input type="checkbox"/> Work on a special project in order to strengthen or build on a competency or skill                   | <input type="checkbox"/> Read more in the press and periodicals about topics that are relevant to the sector   |
| <input type="checkbox"/> Enrol in a course that supports your learning objectives   | <input type="checkbox"/> Participate in an informational interview with somebody who is currently working in a position you are interested in pursuing |
| <input type="checkbox"/> Volunteer to lead and/or participate in a task force   | <input type="checkbox"/> Lead/manage a significant project   |
| <input type="checkbox"/> Conduct an exploratory visit to a unit/department/organization you are interested in pursuing        | <input type="checkbox"/> Cross train within your organization for a job you're interested in pursuing  |
| <input type="checkbox"/> Ask your supervisor for a project that would provide an opportunity to "stretch"                     | <input type="checkbox"/> Tackle a long-standing problem in your work team. Present a viable solution and offer to help implement it                    |
| <input type="checkbox"/> Take a course or read a book in order to improve your understanding of a business project or problem | <input type="checkbox"/> Create an organized file of people in your network that includes contact dates and information                                |
| <input type="checkbox"/> Join and become active in a professional society or industry organization                            | <input type="checkbox"/> Mentor and/or train other colleagues  |
| <input type="checkbox"/> Volunteer for an organization that you are interested in work with                                   | <input type="checkbox"/> Join Toastmasters   |
| <input type="checkbox"/> Enrol in a self-study that focuses on a competency you'd like to develop                             | <input type="checkbox"/> Other:  |

## Appendix F – IDP Template

Name: \_\_\_\_\_

Date: \_\_\_\_\_

### Current State

What are my strengths?

- 1.
- 2.
- 3.

What are my weaknesses?

- 1.
- 2.
- 3.

What is the feedback I receive from others (both positive and negative)?

What other performance indicators do I notice?

### Desired State

What is my development priority?

What skill or behaviour do I want to develop or leverage?

Criteria for success: Write a brief description of the skill or behaviour above when performed adequately/successfully.

## Take Action

Action Steps to practice new skills	Who to involve	Due Date

Situations	Behaviours/Actions
Situations, people, or events that signal the need to demonstrate new skills/behaviours (i.e. “Every time I see the following situations, I will demonstrate new behaviours”)	I will take the following development action (i.e. What new skills/behaviours will I try? Where will I push my comfort zone?)
1. 2. 3.	1. 2. 3.

How will I gain new knowledge and skills that I need?	Due Date
---	----------

## Seek Feedback and Support

How will I track my progress and get input from others?
Who will I ask for feedback?

When?

### Reflect on what happens

What worked?

What didn't work?

What do I want to do differently next time?

### Next Steps

When and how will I evaluate what I need to work on next?

How can I share the knowledge and skills that I gain to help others?







