

Environmental Public Health Leadership Institute

2009-2010 Individual Development Plan Guide for Fellows

Individual Development Plan (IDP)

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Assessment Tools, Coaching and IDP Schedule

DATE	ASSIGNMENT/ACTIVITY
January 20, 2009	MBTI Online Assessment Due
January 20, 2009	Receive Mentor/Fellow Assignments
January 30, 2009	Skillscope Online Assessment Completed by Fellow and others

DATE	ASSIGNMENT/ACTIVITY
February 9, 2009	1:00 - 3:00 PM CST: Fellow Orientation to Individual Development Plan (IDP), coaching, mentoring and leadership project plan via Web-Ex
February 23-27, 2009	Session I: Atlanta, GA (Receive MBTI and Skillscope results)

DATE	ASSIGNMENT/ACTIVITY
March 2009	Mentor Team Charter Completed
March 6, 2009	Submit request for a Coach
March 20, 2009	Assignment of Fellow to Coach
March 27, 2009	Coaches first contact with assigned Fellows within 7 days of receiving assignment

DATE	ASSIGNMENT/ACTIVITY
April 10, 2009	Scheduled coaching sessions within 14 days of receiving assignment

DATE	ASSIGNMENT/ACTIVITY
May 8, 2009	Individual Development Plan Due
May 22, 2009	Coaches review and respond to Fellow re: Draft IDP

DATE	ASSIGNMENT/ACTIVITY
September 7, 2009	Change Style Indicator (CSI) Assessment Due

DATE	ASSIGNMENT/ACTIVITY
October 19-23, 2009	Session II: St. Louis, MO (Receive CSI results)

DATE	ASSIGNMENT/ACTIVITY
November, 2009	Using additional information from CSI, refine IDP

DATE	ASSIGNMENT/ACTIVITY
December 18, 2009	Submit Mentor and Coach Evaluations

DATE	ASSIGNMENT/ACTIVITY
January 11, 2010	Final Report on Individual Development Plan Due

DATE	ASSIGNMENT/ACTIVITY
February 22-26, 2010	Graduation, Atlanta, GA

- Subsequent follow up calls with Coach to be determined by Fellow
- It is recommended that Fellow follow up with Coach at least once during the EPHLI year
- Coach should follow up with Fellow during November/December of EPHLI year

Using Individual Development Plans to Leverage Leadership Strengths

By taking part in EPHLI, you have made a commitment to engage in a process of self-assessment and leadership development. One objective of EPHLI is to reinforce a habit of ongoing individual development planning. Over the course of the year, you will receive feedback about yourself, and you will have opportunities to expand and strengthen your leadership skills and competencies. You will build your experiences into an individual development plan, or IDP.

EPHLI utilizes a variety of assessment tools, group learning exercises, learning teams, technology based (telephone/WebEx) sessions to assist Fellows with their Individual Development Plans. These interactive educational opportunities provide Fellows with information so they can plan for, develop, and execute a plan to increase skills and competencies specific to excellent leadership.

Please note: The IDP can be a very personal document, and for this reason it can be kept confidential between you, your coach, or anyone else you choose.

I. Assessment Tools and Exercises

Fellows are responsible for the completion of the following individual assessment tools. The assessment results are utilized in the Individual Development Plan process throughout the EPHLI year.

- **Myers Briggs Type Indicator (MBTI):** The MBTI is one of the most widely used and reliable personality inventories in the world. It is extremely useful as our personality types are most often reflected in the manner in which we accomplish our work, supervise employees, approach problem solving, and react within work situations. Understanding your personality type will assist you in your effort to improve your leadership skills. The online MBTI assessment is completed online prior to the first onsite EPHLI session. The results are your personal record and will not be shared with others. The MBTI will be explained in detail during the first on-site session.
- **Skillscope:** Skillscope is an effective and efficient online 360 degree tool for giving individuals an assessment of how they are perceived by their co-workers and boss on critical skills needed to perform their jobs. Like the MBTI, Skillscope has been tested for reliability utilizing the results of managers in a variety of occupations and careers. Each Fellow completes this survey and also asks their immediate supervisor and 3-5 direct reports or colleagues to complete the Skillscope survey. For the results of the Skillscope to be useful Fellows should have surveys from themselves, their boss, and at least 3 others. The Skillscope is your personal report

and will not be shared with others. The results will be explained in detail during the first on-site session.

- **Skillscope Development Planning Guide:** This workbook-style guide helps you analyze your feedback report, identify developmental needs and set an action plan for long-term development. It will assist you in identifying strengths and challenges that would be useful to address in your IDP. The Skillscope Development Planning Guide will be available and discussed during the first on-site session.
- **Change Style Indicator:** The CSI is a short and powerful online assessment instrument designed to measure your preferred style in approaching change and dealing with situations involving change. Understanding your approach to change is extremely important for effective leadership, especially in today's world of rapid change. This assessment will be completed prior to the second on-site session and will be explained during the second onsite session.
- **PaperScrapers:** This is a simulation exercise that is designed to enhance learning about *Team Building, Project Management, Creativity and Innovation, Team Problem Solving, and Diverse Use of Team Talents*. This simulation helps put into play the elements that have been learned about ourselves and others through the MBTI, Skillscope, and CSI. The simulation exercise is conducted during the second on-site session.

II. Individual Development Plan (IDP) Process

The IDP is an integral part of EPHLI that provides the tools for each fellow to engage in a self-assessment process throughout the year. During this process, the Fellows identify and measure goals to improve their personal leadership development skills. The tools that help to support this self-assessment process include:

- The Myers-Briggs Type Indicator (MBTI)
- Skillscope 360 Degree Survey and Workbook
- Mentors
- One on One Individual Coaching (optional)
- Change Style Indicator
- On-site Session Activities including Paper Scrapers

IDPs have long been used in government and business as a tool to help employees develop their skills, further their agency's mission, and achieve their career goals. IDPs encourage a focused approach to each individual's training or developmental needs and provide for a measured evaluation of success.

EPHLI has designed the attached IDP template and asks that each Fellow uses this template to address one or two key areas identified by the Skillscope survey to improve specific leadership skills this EPHLI year.

You will use the results of your assessment tools and feedback from your Coach and EPHLI faculty to complete your Individual Development Plan using the attached IDP template (Attachment 1). You can find the electronic version of the template at <http://www.heartlandcenters.slu.edu:16080/ephli/coaches.htm>.

Initially the results of your MBTI and Skillscope assessments will provide insights into your leadership strengths and challenges. After the second on-site session, the results of the CSI will further enhance your IDP process. The ideal IDP should primarily focus on two things: 1) leveraging your strengths and skills, and 2) providing new skills and knowledge that will help you become a more effective leader. The Individual Development Plan process involves each Fellow asking him/herself the following questions:

- » What are my goals over the next five years?
- » What do I see myself doing in the next 3-5 years?
- » What are my greatest leadership strengths and how can I build on them more effectively?
- » What are the weaknesses that make it difficult for me to do my job or may prevent me from reaching my goals?
- » What direction is my organization going and what will the organization need from me and other employees in the future?

After answering these questions, each Fellow should identify developmental opportunities that will help build on his/her strengths and address skill challenges in such a way that he can better serve the needs of the organization and reach his goals to become a stronger leader. Developmental opportunities can take many forms, and a mix of training and experiential learning should be included on the IDP. Besides formal training in a classroom setting (the most common-and costly-option), other excellent developmental opportunities include:

- Shadowing of senior executives
- Mentoring
- Distance learning through the internet
- Assignment to a project team
- Cross-training
- Exposure to greater responsibilities
- Involvement in outreach efforts
- Temporary assignments in other offices or posts
- Readings on the topic
- Discussions with colleagues

IMPORTANT NOTE: Please refer to the Assessment Tools, Coaching and IDP Schedule on pages 3-4 for important due date information.

III. One on One Coaching

Coaching is an ongoing relationship which focuses on the “coachee” (Fellow) taking action toward reaching their vision, goals or desires. Coaching uses a process of inquiry and personal discovery to build the Fellow’s level of

awareness and responsibility and provides the Fellow with support and feedback. The Coach may also provide references and advice to the Fellow on how and what can be done to address specific skills and challenge areas.

- **Perspectives on Coaching/Mentoring**

The terms “coach” and “mentor” are sometimes be used interchangeably, but they actually refer to people in very different roles. While both may support an individual to meet specific goals for personal growth and change, coaching tends to be more focused on results and outcomes, such as the development of a certain skill, whereas mentoring may stress the growth process itself. A mentor often has expertise in the mentored individual’s specific field, while a coach imparts specific desired skills but might not share an occupational background with the coached individual. Both coaching and mentoring are important in successful leadership development.

- **Why should a Fellow choose One on One Coaching?**

The IDP is an integral part of EPHLI that provides the tools for each fellow to engage in a self-assessment process throughout the year. During this process, the Fellows identify and measure goals to improve their personal leadership development skills. If you choose to work with a Coach during the EPHLI year, your Coach can assist you in the following:

- To better understand your Skillscope, MBTI and CSI
- To help focus on which skills to work on this year
- To understand how your basic personality traits pose both benefits and challenges to your potential success as a leader.
- To provide you with a “safe” environment in which to discuss your IDP and ideas on how to measure your success.

- **Important Issues in the Coaching Relationship**

Early in the EPHLI cycle, the Coach and Fellow should set their goals and agenda as a team. It is helpful to ask the question: What do you want to achieve through this coaching relationship?

Don’t be afraid to seek help from your Coach. Coaches have skills, knowledge, and connections that could help you – but they were once in your position and are willing to support you during your growth and development process.

You have certain responsibilities within the coaching relationship. You should:

- Be available, open to new ideas, communicative, and willing to put effort into the coaching process.
- Read and be prepared to discuss and utilize all required assignments.
- Contact your coach whenever appropriate for consultation, coaching, and encouragement.
- Discuss concerns, problems, and challenges with your coach.

Take responsibility for your own growth as a professional; do not depend on your Coach to control or steer this growth. Fellows are expected to lead the coaching process by taking ownership for their own progress and notifying their coaches of their needs.

• **Next Steps in the Coaching Relationship**

Fellows are not automatically assigned a Coach. Fellows who would like the help of a Coach should notify the EPHLI office by **March 6, 2009** and you will be assigned a Coach.

The Coach will contact you via e-mail within 7 days of the assignment to set up a short initial “get to know one another” phone conference within 14 days of the assignment if possible.

After this call you should either forward your MBTI and Skillscope to the Coach or request that the EPHLI Office forward these survey results to the Coach for you.

Once the Coach has received and reviewed your survey tools, a telephone conference call will be scheduled for the two of you to discuss your results and your IDP.

After the Fellow has drafted the IDP, it should be forwarded to the Coach.

The Coach should respond to the Fellow, either by phone or e-mail, within three weeks of receiving the draft. If not, the Fellow should be proactive and follow-up with the Coach to schedule the next call.

The IDP should be submitted to EPHLI Office by **May 8, 2009**.

It is expected that any needed follow up between Fellow and Coach will be initiated by the Fellow, not the Coach. Fellows should contact the coach at least once during the year to report that the IDP is going well or to ask for additional guidance. The Coach will take clues from the Fellow about the amount of (if any) follow up is wanted. If for any reason a Fellow is unable to make contact with the Coach, please call the EPHLI office so we can assist you. The Coach should check in with the Fellow toward the end of the EPHLI year, (November or December).

The Fellow should submit the Coach Evaluation (Attachment 2) by **December 18, 2009**.

The final report on progress made toward the IDP is due to the EPHLI Office by **January 11, 2010**.

If you have any questions about any part of the IDP or Coaching process, please contact Kelly Ewertowski in the EPHLI Office (ewertokm@slu.edu, 314/977-3233).

Environmental Public Health Leadership Institute

Attachment 1

Individual Development Plan (IDP)

The Individual Development Plan (IDP) is an integral part of the Environmental Public Health Leadership Institute (EPHLI) that provides the tools for each fellow to engage in a self-assessment process throughout the year. During this process, you identify and measure goals to improve your personal leadership development skills. Completion of your IDP is required to graduate from EPHLI. **Please review the Individual Development Plan Guide for Fellows prior to beginning your Plan.**

I. Individual Development Plan

The attached template and examples are provided to help you plan and record your IDP goals and activities. **Draft and submit your IDP electronically to Kelly Ewertowski at ewertokm@slu.edu and to your Coach (if you have requested one) by May 8, 2009.** You are responsible for assessing your progress on these goals throughout the EPHLI experience.

IDP Guidelines:

- **Review.** Carefully review the results of your SKILLSCOPE 360 survey and your MBTI. Identify specific areas that you believe require improvement.
- **Identify.** Identify between two and three leadership skills that you wish to improve during EPHLI.
- **Reflect.** Think about your Leadership Project and identify how it can provide you with opportunities to improve the leadership skills that you have chosen to work on during EPHLI.
- **Set Goals.** Establish one to three goals (based on the leadership skills you wish to improve) using your self-assessment results (MBTI and SKILLSCOPE 360) and input from your individual Coach and others. You are welcome to consult with your Mentor at any time on this Plan.
- **List Activities.** Identify steps will need to take to reach each goal and incorporate dates by which each activity will be completed.
- **Create Measures.** Indicate how you will assess your progress on each goal.

II. Individual Development Plan Progress Report

*Frequently throughout the EPHLI year, you should take your edited/updated IDP form and record your progress for each goal and activity. **Submit your FINAL IDP to Kelly Ewertowski at ewertokm@slu.edu by January 11, 2010.***

IDP Progress Report Guidelines:

- **Record Results.** Throughout the EPHLI year, record whether or not you completed the activities and progressed towards meeting your goals. You may revise activities as needed.

IMPORTANT! *The following examples should assist you in completing your Plan. You should have at least one completed page (non-shaded parts) for each of your goals – you may add additional pages as needed. If possible, please use the electronic version of this template that you will find on the EPHLI website at <http://www.heartlandcenters.slu.edu:16080/ephli/coaches.htm>.*

EPHLI: INDIVIDUAL DEVELOPMENT PLAN (EXAMPLE)

Name: *(Your Name Here)* Date:

Goal: The outcome you want to achieve. This could be a personal leadership skill or trait that you want to improve or develop.

[EXAMPLES:]

By the end of the year, I will have improved my delegation and employee empowerment abilities. I will become more skilled at encouraging decision-making at lower levels, and be freed up to spend more time on strategic planning.

By July 2006 I will have worked to improve my public communications skills by seeking 3 opportunities and conducting public presentation on emerging environmental issues.

By March 2006 I will have established relationships with key local political powers, state legislative personnel, or national advocates to discuss and gain their support regarding important environmental concerns.

Activities: List the specific activities you will undertake to reach your goal. This could be reading, training classes, consulting with others, taking on new projects, or anything else. Can be directly Institute-related or something you do on your own.

<p>A. EXAMPLE: <i>By October 15, schedule a meeting with my leadership team to discuss and renegotiate my role in day-to-day budgetary responsibilities, data analysis, and report writing. Based on results of this meeting, I will schedule and implement a training process for them around skills and competencies identified as needed. They will complete the training program by January 30, 2005. By the end of this training, they will be capable of completing budgets for their units, analyzing health data, and compiling quarterly reports—three tasks that have consumed much of my time.</i></p>	<p>Completed? <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No Comments: <i>Completed</i></p>
<p>B. EXAMPLE: <i>By October 15 I will read one delegation/empowerment book suggested by the EPHLI course, and consult with 2 EPHLI peers who have addressed the same issue.</i></p>	<p>Completed? <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No Comments: <i>Read Zapp the Lightening of Empowerment. Also had telephone conversations with Ben Sack and Randi Jones on their experiences with empowerment.</i></p>
<p>C. EXAMPLE: <i>By March 15 I will have my leadership team members developing and implementing plans for continuous improvement of their work units. A system will be designed to monitor their projects. Furthermore, they will conduct a benchmarking study to determine best practices used in other health agencies around the state. They will have ownership for designing and conducting these projects.</i></p>	<p>Completed? <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No Comments: <i>Completed by February 15.</i></p>

Measures/Evidence: What kind of measure or evidence will you use to know that you accomplished the goal? (For example, 75% of divisions will have active quality improvement teams by April 1, review by third party, and better feedback from employees or supervisor, new initiative launched?)

[EXAMPLE: I will keep a log of the number of projects completed by my leadership team in the coming year and compare these results to the previous year. I will track the time I spend on planning and prioritizing compared to previous years. Finally, I will conduct a pre-post survey and meeting to determine the degree to which my leadership team feels a sense of ownership, commitment, and empowerment.]

Did you accomplish your goal? Yes Partly No Explain: *I am very pleased with my progress. Leadership team members say they appreciate their increased decision-making power. After the initial discomfort with the new approach, they have begun to embrace it and are making decisions about their staff and programs freely, consulting with me when appropriate. My direct reports do show greater ownership, commitment, and sense of empowerment.*

EPHLI: INDIVIDUAL DEVELOPMENT PLAN**Name:****Date:**

Goal: The **outcome** you want to achieve. This could be a personal leadership skill or trait that you want to improve.

Activities: List the **specific activities** you will undertake to reach your goal. This could be reading, training classes, consulting with others, taking on new projects, or anything else. It can be directly Institute-related or something you do on your own.

A. By (date) I will	Completed? <input type="checkbox"/> Yes <input type="checkbox"/> No Comments:
B. By (date) I will	Completed? <input type="checkbox"/> Yes <input type="checkbox"/> No Comments:
C. By (date) I will	Completed? <input type="checkbox"/> Yes <input type="checkbox"/> No Comments:

Measures/Evidence: What kind of measure or evidence will you use to know that you accomplished the goal?

Did you accomplish your goal? Yes Partly No Explain, making reference to your measures (above) if possible:

EPHLI: INDIVIDUAL DEVELOPMENT PLAN**Name:****Date:**

Goal: The **outcome** you want to achieve. This could be a personal leadership skill or trait that you want to improve.

Activities: List the **specific activities** you will undertake to reach your goal. This could be reading, training classes, consulting with others, taking on new projects, or anything else. It can be directly Institute-related or something you do on your own.

A. By (date) I will	Completed? <input type="checkbox"/> Yes <input type="checkbox"/> No Comments:
B. By (date) I will	Completed? <input type="checkbox"/> Yes <input type="checkbox"/> No Comments:
C. By (date) I will	Completed? <input type="checkbox"/> Yes <input type="checkbox"/> No Comments:

Measures/Evidence: What kind of measure or evidence will you use to know that you accomplished the goal?

Did you accomplish your goal? Yes Partly No Explain, making reference to your measures (above) if possible:

EPHLI: INDIVIDUAL DEVELOPMENT PLAN**Name:****Date:**

Goal: The **outcome** you want to achieve. This could be a personal leadership skill or trait that you want to improve.

Activities: List the **specific activities** you will undertake to reach your goal. This could be reading, training classes, consulting with others, taking on new projects, or anything else. It can be directly Institute-related or something you do on your own.

A. By (date) I will	Completed? <input type="checkbox"/> Yes <input type="checkbox"/> No Comments:
B. By (date) I will	Completed? <input type="checkbox"/> Yes <input type="checkbox"/> No Comments:
C. By (date) I will	Completed? <input type="checkbox"/> Yes <input type="checkbox"/> No Comments:

Measures/Evidence: What kind of measure or evidence will you use to know that you accomplished the goal?

Did you accomplish your goal? Yes Partly No Explain, making reference to your measures (above) if possible:

Environmental Public Health Leadership Institute

One-on-One Coaching Evaluation for Fellow to Evaluate Coach

1. Fellow Completing Evaluation _____

Coach being Evaluated _____

2. Please rate the ease of the process of making contact with the coach and follow-up conversations.

<i>Circle One Number</i>				
Very Difficult	—————▶			Very Easy
1	2	3	4	5

3. Please rate the effectiveness of having a coach...

a. to help you understand the feedback provided on the Skillscope 360 and MBTI.

<i>Circle One Number</i>				
Not at All	—————▶			Very Effective
1	2	3	4	5

b. in identifying specific development areas and goals.

<i>Circle One Number</i>				
Not at All	—————▶			Very Effective
1	2	3	4	5

c. in suggesting resources and action plans to achieve your goals.

<i>Circle One Number</i>				
Not at All	—————▶			Very Effective
1	2	3	4	5

d. in providing follow-up on individual progress on development goals.

<i>Circle One Number</i>				
Not at All	—————▶			Very Effective
1	2	3	4	5

Please complete this form and return it as an e-mail attachment to Kelly Ewertowski at ewertokm@slu.edu when you have completed the Coach/Fellow relationship – no later than December 18, 2009.