OHIO HOUSING FINANCE AGENCY

2013 NCSHA Award Nomination

Management Innovation: Human Resources

INDIVIDUAL DEVELOPMENT PLAN MODEL

Douglas Garver, Executive Director
Clare Long, Director of Human Resources

2013 Annual Awards Entry Form
(Complete one for each entry.)

Entry Name	Individual Development Plan Model

Fill out the entry name *exactly* as you want it listed in the awards program.

HFA	Ohio Housing Finance Agency
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Entry form with description, check(s), and visual aids (optional) must be received by NCSHA by **Monday, July 1, 2013.**

Use this header on the upper right corner of each page.

HFA   _____

Entry Name   _____

Communications	Homeownership	Legislative Advocacy	Management Innovation
☐ Annual Report ☐ Promotional Materials and Newsletters ☐ Creative Media	☐ Empowering New Buyers ☐ Home Improvement and Rehabilitation ☐ Encouraging New Production	☐ Federal Advocacy ☐ State Advocacy	☐ Financial ☒ Human Resources ☐ Operations ☐ Technology

Rental Housing	Special Needs Housing	Special Achievement	Are you providing visual aids?
☐ Multifamily Management ☐ Preservation and Rehabilitation ☐ Encouraging New Production	☐ Combating Homelessness ☐ Housing for Persons with Special Needs	☐ Special Achievement	☒ YES ☐ NO

HFA: Ohio Housing Finance Agency
Category: Management Innovation – Human Resources
Entry Name: Individual Development Plan Model
Douglas Garver, Executive Director
Clare Long, Director of Human Resources

"Cultivating an organization that engages employees in achieving its mission and striving to be a public-sector employer of choice" is an OHFA strategic priority. OHFA's goal is to maximize employee potential and behavioral competencies in order to accomplish this. An Individual Development Plan (IDP) is a uniquely tailored action plan that contains developmental activities aimed at enhancing an employee's competencies, as well as an employee's capacity to take on broader leadership responsibilities.

Background of the IDP Model
OHFA's Workforce Planning Initiative, launched in the summer of 2011, is focused on employing, deploying, developing and evaluating its workforce in order to achieve its strategic goals while utilizing available resources. As part of the Workforce Planning process, a gap analysis was conducted to reflect the differences between the Agency's workload demand and workforce supply. The gap analysis identified such things as current staffing, performance and compensation gaps, and gaps that will be created when individuals in key positions retire.

In an effort to address gaps in the area of performance, OHFA implemented a new performance review system in 2011. This system required supervisors to evaluate employees based on the goals described in the Workforce Plan and competencies that contribute to job success. These competencies included leadership, job knowledge, communication and customer focus.

After the Workforce Plan identified the number of employees potentially eligible to retire, the future of OHFA's workforce became a major focus for the Agency in 2012. The need for Succession Planning was built upon the fact that, by the end of 2017, 53 employees, or 34 percent of OHFA's current workforce, would be eligible to retire. Based on these findings, OHFA took an integrated approach in preparing its Succession Plan. In other words, the Succession Plan goes beyond focusing on replacing individuals in mission-critical positions, but also serves to strengthen and develop leadership talent at all levels of the organization by assessing bench strength, identifying a talent pool and offering an action plan. Creating the Succession Plan included identifying key critical positions in the Agency and preparing a profile for each of these positions. Each profile includes a brief description of the position's alignment with OHFA's mission, the mission critical functions performed in the position and competencies that an incumbent in the position should possess. These "competencies" are also listed as the necessary knowledge, skills and abilities on the incumbent's position description and are the minimum characteristics one should possess.

Together, the performance review system and the Succession Plan highlighted the need for OHFA to reconstitute its Employee Development and Training Program in order to focus on raising and enhancing core competencies and developing leadership talent. In addition to offering a leadership training program, OHFA deployed an IPD model in the fall of 2012.

OHFA's IDP Model

OHFA's IDP model consists of the IDP template and IDP Guide. These documents are described as follows:

- *IDP Template*: The IDP template is a tool designed to capture specific ideas and action steps to support an employee's individual development. Development is a partnership among the Agency, the employee, and the manager. There are three components to consider when completing a plan:

  - ➢ Developing in current role
  - ➢ Expanding skill sets and knowledge areas
  - ➢ Preparing for future roles

  The first section of each IDP lists competencies that are recognized as being important to success in a position. The template also allows supervisors to assign individual competencies to a specific position and the employee to select position specific competencies. An employee may choose two to four competencies to focus on. The last section of the IDP is the employee's action plan. When completing a plan, employees are instructed to review prior evaluations and to review not only their position descriptions, but also the position descriptions of those holding mission-critical positions. If an employee is unsure of strengths, developmental needs, or what focus to take, a meeting with his or her manager is recommended. The employee's IDP should consist of activities that will help the employee achieve the Agency's goals and support identified focus areas.

- *IDP Guide*: The IDP Guide is a collection of performance development resources for all OHFA staff and contains practice tips and resources for each competency for use in self-directed development and learning. These resources include the Competency Library – a collection of OHFA individual competencies, their definitions and samples of behaviors seen at each proficiency level. These competencies include those upon which employees are rated annually, as well as those that an incumbent should possess in an Agency mission-critical position.

The IDP template and the IDP Guide, including the Competency Library, help managers and employees make the connection between competencies and day-to-day performance. OHFA's IDP allows an employee to document strengths, developmental needs, and developmental focus in one document.

Results

As of May 2013, several OHFA employees have completed the IDP process. OHFA employees who have created an IDP have been able to consistently focus on strengthening the goals and competencies set for themselves. By having a plan and working with their managers, the employees said they feel it has been easier to complete the tasks and objectives as they have been held accountable with a thorough plan to follow. They have taken personal responsibility for their development and are enhancing or acquiring the skills they need to grow in the Agency.

A sample Action Plan that was completed by the Agency's Employee Training and Development Manager reflects a path that will enhance platform skills and lead to a better understanding of training options to present in the Agency:

On the Job Learning	Timeframe	Completed	Self-Directed Learning (Books, Job Shadowing)	Timeframe	Completed
Speed of Trust	Nov. 2012	Yes	The Confident Speaker	July	Ongoing
Create OHFA Series	August 2013	Ongoing	Confessions of a Public Speaker	July	Ongoing
Classes/ Workshops/ Conferences	*Timeframe*	*Completed*	**Professional/ Community Activities**	*Timeframe*	*Completed*
ASTD Conference	May 19-22	Yes	Join ASTD	December	Yes
Toastmasters	1st & 3rd Thursday	Ongoing			
Mentoring	*Timeframe*	*Completed*	**Assessments**	*Timeframe*	*Completed*
			Strength Assessment		
Formal Education	*Timeframe*	*Completed*	**Other**	*Timeframe*	*Completed*

Individual Development Planning benefits the organization by aligning employee training and development efforts with the mission, goals, and objectives of the Agency. Supervisors will develop a better understanding of their employees' professional goals, strengths, and development needs—which will result in planning training and development programs that employees want to focus on. The number of IDPs completed by employees has also been incorporated in the Agency's dashboard which marks progress in reaching the goal of maximizing employee potential and behavioral competencies.

<u>Conclusion</u>
OHFA's IDP model will help the Agency achieve its strategies set forth in its Annual Plan by ensuring that employee development and training is focused on enhancing competencies employees need to assume leadership responsibilities. This model is a low-cost, replicable strategy that provides a clear direction to assessing OHFA's human capital in order to respond to current and future challenges in Ohio's affordable housing industry.

Individual Development Plan Guide

Table of Contents

Introduction

The Individual Development Guide is a collection of performance development resources for all Ohio Housing Finance Agency staff. These resources include:

- Competency Library: A collection of OHFA individual competencies, their definitions and samples of behaviors seen at each proficiency level.
- Development Guides: Practice tips and resources for each competency for use in self-directed development and learning.
- Individual Development Plan (IDP): A tool designed to capture specific ideas and action steps to support your individual development.

Together, the Competency Definitions, the Development Guide and the Individual Development Plan help managers and employees make the connection between competencies and day-to-day performance.

Individual Development Plan Instructions

One of OHFA's core values is to foster employee development to enhance performance, productivity, and remain an employer of choice. An Individual Development Plan (IDP) is a uniquely tailored action plan that contains developmental activities aimed at enhancing an employee's competencies, as well as an employee's capacity to take on broader leadership responsibilities.

The IDP allows an employee to document strengths, developmental needs, and developmental focus in one document.   The last section of the IDP is an employee's action plan. The first section of each IDP lists competencies that are recognized as being important to success in a position. All OHFA employees share the statewide and agency competencies that are listed. Individual competencies may also be assigned to a specific position by a supervisor. However, the IDP allows you to select position specific competencies. To choose position specific competencies, review the individual development guide and the position description for the job. Choose two to four competencies for the position.

When completing the development portion of the IDP, it is helpful to review prior evaluations and meet with your manager, if you are unsure of strengths, developmental needs, or what your focus should be.

The development plan on the third page of the form should consist of activities that will help an employee achieve the goals in the development portion of the form. The development guide should be referred to and suggests activities that could be pursued for each competency.

Individual Development Plan (IDP) Form

Name: Enter first & last name   Job Title: Enter job title   Date:

Office: Choose an item.   Supervisor: Enter supervisor's name   Review Year: Enter year

Instructions – Development is a partnership between the agency, the employee, and the manager. One of the key steps of development is to establish a development plan. There are three components to consider when creating this plan:

- **Development in current role**
- **Expand skill set and knowledge areas**
- **Prepare for future roles**

Complete the IDP & attach to IDP checklist with any additional documents that may be required.

Competencies
Statewide:
1. **Customer Focus** – listens and responds effectively, provides courteous and knowledgeable service, demonstrates knowledge of job-specific techniques and skills
Agency Specific:
1. **Job Knowledge** – demonstrates appropriate basic skills, problem solving & decision-making, ability to perform job, able to learn new job skills relevant to the position 2. **Self-Management** – builds trust, keeps commitments, develops oneself, demonstrates a commitment to the mission 3. **Leadership** – provides a clear direction to the team, uses sound judgment, engages employees 4. **Communication** – respectfully receives ideas, thoughts, & feelings, accurately exchanges information, works harmoniously with others
Position Specific:
1. **Competency #1** –   2. **Competency #2** –   3. **Competency #3** –   4. **Competency #4** –

Strengths
Strengths can be based on your current job performance or your career aspirations.
1. 2. 3. 4. 5.

Development Needs
Development needs can be based on your current job performance or your career aspirations.
1. 2. 3. 4. 5.

Development Focus
Select two or three areas from the lists above to focus on for the current year.
1. 2. 3.

Employee Development Plan: Identify and list activities that will support the identified focus areas. Use a wide variety of developmental approaches.

On the Job Learning	Timeframe	Completed	Self-Directed Learning (Books, Job Shadowing)	Timeframe	Completed
Classes/Workshops/ Conferences	Timeframe	Completed	Professional/ Community Activities	Timeframe	Completed
Mentoring	Timeframe	Completed	Assessments	Timeframe	Completed
Formal Education	Timeframe	Completed	Other	Timeframe	Completed

Acting Decisively

Definition: Performs work with energy, drive and decisive action.

Limiting Demonstrates behaviors that show a need for more experience and opportunities for development.	☐ May be slow to act if directions are not detailed or clearly defined or if multiple options exist ☐ May be impulsive in taking action; shows some tendency to be overly assertive ☐ Does not demonstrate initiative or proactive behavior; appears overly concerned about making mistakes or that decisions may be criticized ☐ Often seeks approval, even when empowered to make a decision; will not take independent action
Contributing Demonstrates behaviors that meet performance expectations while supporting team and customer needs.	☐ Anticipates problems and roadblocks; redirects activities and plans that may not be working ☐ Supports the work activities of others especially during "crunch" periods that require extra help ☐ Takes initiative to drive progress, while keeping others appropriately informed ☐ When necessary, takes action with limited and possibly incomplete information; moves beyond uncertainty and discomfort by taking calculated risks
Advancing Demonstrates behaviors that show high levels of expertise and contribute to office- and agency-wide initiatives.	☐ Influences and motivates individuals and various groups of people to help them expand their level of comfort and move towards meaningful action ☐ Energizes initiatives that may be bogged down or behind schedule; identifies bottlenecks and initiates action to help regain momentum ☐ Develops and implements dynamic plans that are supported by clear actions; proactively identifies, tracks, measures, and improves projects ☐ Demonstrates comfort in making decisions and resolving a broad range of issues; collaborates or escalates issues when necessary to achieve outcomes

Acting with Integrity

Definition: Consistently adheres to an effective set of core values and beliefs that support the organizational values and what is ethically proper.

Limiting Demonstrates behaviors that show a need for more experience and opportunities for development.	☐ Talks about and demonstrates professional, industry and/or organizational standards when convenient or when politically appropriate, but not consistently ☐ At times gives a mixed message about what is really believed, valued or thought; actions don't consistently align with words ☐ At times perceived as someone who is not fully trustworthy; may not fully live up to commitments, admit mistakes or keep confidences ☐ When challenged by an ethical dilemma, may retreat and take no action
Contributing Demonstrates behaviors that meet performance expectations while supporting team and customer needs.	☐ Lives up to commitments and organizational values ☐ Keeps confidences ☐ Talks about (or communicates in other ways) professional, industry, organizational and own ethical standards; behaves in accordance with expressed standards ☐ Tells the truth; admits mistakes and is willing to push back in situations believed to be misguided, inappropriate or wrong
Advancing Demonstrates behaviors that show high levels of expertise and contribute to office- and agency-wide initiatives.	☐ Confronts and challenges decisions, behavior and prejudice believed to be wrong; challenges those in higher level roles when appropriate to be clear about the organizational values and to widely and consistently demonstrate these values ☐ Openly discusses professional and ethical dilemmas and own mistakes; creates an environment where others are also able to discuss, explore and challenge dilemmas that confront commonly held values and standards ☐ Demonstrates candor balanced with sensitivity, empathy and timing; able to be truthful, even if unable to fully disclose confidential and/or sensitive information ☐ Inspires others to clarify their own personal values, demonstrate them through words and actions, and become clear on how they align (or may not align) with those of the organization

Building Productive Relationships

Definition: Relates well and builds rapport with a wide range of personalities at all levels, both internal and external to the organization, even in high-tension situations.

Limiting Demonstrates behaviors that show a need for more experience and opportunities for development.	☐ Tends to be pleasant towards others but may not be comfortable relating to a wide variety of people ☐ Sometimes let's problems involving others fester until they become bigger and more apparent; avoids confronting uncomfortable interpersonal situations ☐ May not be aware of how own style impacts others ☐ Tends to talk more than listen, occasionally leaving others unclear on key messages or information
Contributing Demonstrates behaviors that meet performance expectations while supporting team and customer needs.	☐ Easy to approach and engage in conversation; uses language and behavior appropriate for a professional workplace ☐ Steps up to interpersonal conflicts that impact effective working relationships; uses tact to resolve tense situations ☐ Conveys understanding of others; expresses ideas, needs and thoughts in a way that connects well to other stakeholders ☐ Treats others fairly and respectfully; seeks to find common ground; encourages collaboration
Advancing Demonstrates behaviors that show high levels of expertise and contribute to office- and agency-wide initiatives.	☐ Actively networks and easily builds lasting, constructive, and mutually beneficial relationships both inside and outside the organization ☐ Defuses volatile situations both in own area and when appropriate, beyond; brings insight that helps build on common ground ☐ Maintains poise and effectiveness with others in potentially stressful situations; still able to listen, summarize, and analyze various viewpoints in a clear and concise way ☐ Works through (not around) challenging interpersonal relationships; provides timely and honest feedback in a constructive and supportive manner

Continuously Improving Quality

Definition: Committed to quality and organizational effectiveness with a focus on strengthening procedures, processes, and services.

Limiting Demonstrates behaviors that show a need for more experience and opportunities for development.	☐ May not be effective at figuring out efficient ways to get things done ☐ May focus so heavily on adherence to processes and rules that context and a sense of broader impact is lost ☐ May suggest or make marginal improvements but not understand the impact of underlying causes/issues ☐ Not solution-oriented; tends to raise concerns but doesn't consistently suggest solutions, alternatives or options
Contributing Demonstrates behaviors that meet performance expectations while supporting team and customer needs.	☐ Suggests solutions in addition to raising problems; open to suggestions and experimentation for improving work processes ☐ Looks beyond symptoms to identify causes of problems; analyzes problems from different points of view ☐ Eliminates inefficiencies and roadblocks within own area of responsibility; minimizes waste, delays and non-value-added activities ☐ Looks for and learns from others ' best practices; translates great ideas from elsewhere to practical improvements at work
Advancing Demonstrates behaviors that show high levels of expertise and contribute to office- and agency-wide initiatives.	☐ Establishes feedback loops with employees, internal and external customers and invites complaints, comments and suggestions ☐ Demonstrates an understanding about how changes to one part of the system often impact people and processes elsewhere. ☐ Pulls together a cross-section of key people from various functions to discuss processes, frustrations, priorities, and recommendations for improvement ☐ Continuously assesses core processes with a willingness to make changes if needed; researches and recommends new ways that will improve core processes

Developing Staff and Others

Definition: Is aware of each person's strengths, weaknesses, performance and career goals, and provides relevant developmental opportunities that benefit both the individual and the organization.

Limiting Demonstrates behaviors that show a need for more experience and opportunities for development.	☐ May be reluctant to offer perspective or feedback that will help employees understand expectations or progress toward their development/performance goals; may let performance issues fester ☐ Discusses development and career goals with employees about once per year (e.g. during a performance discussion), if at all ☐ Knows weaknesses of people and may emphasize improving them; tends not to think of development in terms of deploying strengths ☐ If development opportunities occur, they are limited to one dimensional (e.g. take a training course to fix the problem) rather than multidimensional (e.g. training combined with peer coaching and on-the-job practice to reinforce learning)
Contributing Demonstrates behaviors that meet performance expectations while supporting team and customer needs.	☐ Coaches employees to align individual strengths and goals with organizational needs ☐ Offers timely, candid and specific feedback about progress (and/or lack of) relevant to performance and development goals ☐ Helps direct reports identify meaningful developmental actions while holding them responsible for achieving desired goals ☐ Provides challenging and stretching tasks and assignments that effectively uses employee strengths and manage weaknesses
Advancing Demonstrates behaviors that show high levels of expertise and contribute to office- and agency-wide initiatives.	☐ Actively identifies and develops the potential in staff; supports employees at all levels of ability in identifying their strengths and in putting these strengths to work ☐ Effectively expresses confidence in people's ability to succeed as well as constructively addresses ineffective performance and behaviors. ☐ Delegates with the intention of growing employees' ability to handle increasingly large challenges. ☐ Builds a pool of talented staff to support succession planning needs.

Directing and Measuring Work

Definition: Sets clear objectives and measurements, assigns responsibilities for tasks and decisions, and assesses progress of work accordingly.

Limiting Demonstrates behaviors that show a need for more experience and opportunities for development.	☐ May not be able to translate ideas of how things should be organized and processed into an effective approach ☐ May set clear goals some of the time but at other times staff is left wondering about expectations ☐ At times, assumes work is being done without monitoring or putting measures in place to assess progress or to adjust workloads ☐ Distributes work with a primary focus on the immediate task; may not be as comfortable directing others on longer term initiatives
Contributing Demonstrates behaviors that meet performance expectations while supporting team and customer needs.	☐ Oversees day-to-day work processes; assesses progress, makes adjustments and balances workloads as needed ☐ Works with staff and customers to set clear expectations, objectives and measures; assigns accountability ☐ When appropriate, sets milestones and quantitative and qualitative measures that are clearly tied to office and agency goals and objectives; recognizes when measures may not be helpful ☐ Designs feedback loops into the work and adjusts work flows or measures as appropriate
Advancing Demonstrates behaviors that show high levels of expertise and contribute to office- and agency-wide initiatives.	☐ Ensures projects have a clear scope, outcomes, measures, critical success factors, expectations, resources, budget, etc. and that those involved understand each ☐ Is a resource person for managing complex initiatives with long term horizons and works effectively with multiple customers to make interim adjustments that meet long term goals ☐ Demonstrates an understanding that there is a difference between delegation and surrendering leadership responsibilities ☐ Inspires others to accomplish both short and long range goals; considers the most effective way based on the group's collective knowledge and patterns of success

Focusing on Customers

Definition: Identifies various internal and external customers, and consistently takes action to exceed their expectations and increase their overall satisfaction.

Limiting Demonstrates behaviors that show a need for more experience and opportunities for development.	☐ Seldom connects with customers to learn what they really need and want, what's working and what isn't. ☐ May focus on internal issues and challenges and at times be blindsided by customer problems ☐ May be challenged to promote the right degree of customer support and flexibility without making too many exceptions. ☐ May not know how to address challenging customer service situations.
Contributing Demonstrates behaviors that meet performance expectations while supporting team and customer needs.	☐ Actively solicits feedback from customers and uses this information to strengthen products and services ☐ Establishes and maintains effective relationships with customers (internal and/or external) and earns their trust and respect ☐ Demonstrates a respect and concern for achieving customer satisfaction, even in difficult situations ☐ Able to say "Yes" and "No" to customer requests in a way that the vast majority of customers respect; when unable to accommodate customer demands, finds alternatives that leave them satisfied
Advancing Demonstrates behaviors that show high levels of expertise and contribute to office- and agency-wide initiatives.	☐ Defines and communicates a customer-focused value, proposition (to staff and customers) to keep customer support focused on adding high level value ☐ Anticipates and proactively acts upon customer needs by understanding emerging trends, asking relevant questions, proposing solutions to emerging challenges. ☐ Engages others and/or team members in exploring customer needs and regularly facilitates input, ideas and actions that contribute to significant improvements in the customer experience ☐ Listens to customer complaints without being defensive; provides formal and informal ways for customers to give feedback without fear of reprisal and designs improvements to meet/exceed their needs

Informing

Definition: Consistently shares necessary information that helps others effectively do their jobs.

Limiting Demonstrates behaviors that show a need for more experience and opportunities for development.	☐ Shares relevant information rarely or only if asked to do so ☐ Has difficulty being clear and concise (verbally or in writing) ☐ Others are sometimes surprised about missed information or left wondering about status; may not reach out in a timely way with needed information ☐ May not be sensitive to the right communication method, right time, or the right level of detail to share
Contributing Demonstrates behaviors that meet performance expectations while supporting team and customer needs.	☐ Ensures important information is shared with those who need to know; routinely keeps others informed ☐ Builds rapport and credibility; seen as forthcoming and transparent ☐ Takes time for questions, feedback and clarification of information, when appropriate ☐ Writes and speaks with groups and individuals in clear and compelling manner; enhances understanding by using examples, stories, analogies, humor, graphics, etc.
Advancing Demonstrates behaviors that show high levels of expertise and contribute to office- and agency-wide initiatives.	☐ Proactively shares key information; aware of important information needs; seeks out information needed and actively shares what stakeholders need to know ☐ Fosters an environment that encourages broad-based sharing of information, whether verbally, in writing or electronically ☐ Uses multiple channels or means to communicate important messages and maintains an appropriate flow of information as situations/needs evolve ☐ Consistently adapts own methods of informing appropriately to account for the audience, styles and desired message; managers also support and hold others accountable for an appropriate level of informing

Leveraging Organizational Resources

Definition: Effectively identifies and uses various resources, relationships and information to accomplish office and agency goals.

Limiting Demonstrates behaviors that show a need for more experience and opportunities for development.	☐ Lacks experience or familiarity with whom and where to go for relevant information ☐ Does not consistently draw from previous experiences and areas of personal expertise; less likely to probe or explore more broadly ☐ Primarily uses internal sources to gather information and resources ☐ Needs to become more familiar with the structure, mission, programs and key issues throughout the agency
Contributing Demonstrates behaviors that meet performance expectations while supporting team and customer needs.	☐ Familiar with agency structure and programs and as appropriate consults with key stakeholders and subject matter experts ☐ Stays informed of organizational changes through formal channels and informal networks ☐ Seeks out and builds upon existing agency resources rather than "reinventing the wheel" ☐ Demonstrates indicates a willingness to move outside of own "comfort zone"
Advancing Demonstrates behaviors that show high levels of expertise and contribute to office- and agency-wide initiatives.	☐ Understands nuances of how state government functions and how to leverage this to accomplish goals; familiar with agency structure and has strong understanding of key stakeholders and office programs across agency boundaries ☐ Navigates challenging situations to respond to sensitive information appropriately ☐ Seen as a subject matter expert on available tools, contacts, agency practices and procedures and shares the information readily to assist others. ☐ Collaborates with colleagues agency-wide and externally to achieve Objectives

Making Effective Decisions

Definition: Uses sound judgment to solve problems and make decisions in a timely manner.

Limiting Demonstrates behaviors that show a need for more experience and opportunities for development.	☐ Experiences difficulty deciding when a quick decision or more thoughtful decision is needed ☐ Tends to procrastinate when making decisions causing delays for customers, peers or staff in their work ☐ May make decisions quickly too often, sometimes without the necessary information ☐ Routinely forms decisions based on a piece of the problem without considering related issues or the big picture
Contributing Demonstrates behaviors that meet performance expectations while supporting team and customer needs.	☐ Collaborates and gains buy-in by considering different ideas or perspectives in decision making. ☐ Recognizes windows of opportunity and creates relevant options for addressing problems. ☐ Takes important information into account and considers its potential impact when making a decision and recognizes when it is more important to be agile. ☐ Coordinates multiple decisions so that information needed early is sequenced and in place for later decisions
Advancing Demonstrates behaviors that show high levels of expertise and contribute to office- and agency-wide initiatives.	☐ Takes decisive action in a crisis and makes practical decisions regardless of popularity when necessary ☐ Holds self and others accountable with timelines and milestones that help set priorities and keep decision making on target ☐ Uses and shares effective processes to gather reliable information from appropriate sources ☐ Remains level-headed even during stressful and high impact situations

Managing Priorities

Definition: Sets priorities and proactively directs time, energy and resources toward high impact activities that advance key organizational goals and initiatives.

Limiting Demonstrates behaviors that show a need for more experience and opportunities for development.	☐ Is often immersed in busywork or distracted by less important details/issues at the expense of high priority tasks; has little sense of what is mission critical ☐ May finish the day sensing a lot has been done but little has been accomplished toward important goals or initiatives. ☐ Driven by urgent matters, reactions and/or personal preferences; struggles to set time aside for important work that may not be urgent; distracted by regular interruptions ☐ May not be sensitive to other people's time or priorities
Contributing Demonstrates behaviors that meet performance expectations while supporting team and customer needs.	☐ Knows which responsibilities and tasks are considered most important to meet the needs of customers and stakeholders ☐ Minimizes interruptions and stays focused on priorities ☐ Devotes majority of time to higher priority work and adjusts priorities as necessary to ensure that daily work aligns with major responsibilities ☐ Uses and shares methods that help others evaluate priorities and stay focused during peak work times
Advancing Demonstrates behaviors that show high levels of expertise and contribute to office- and agency-wide initiatives.	☐ Knows which responsibilities and tasks managers, customers, and other stakeholders consider most important; able to prioritize multiple needs ☐ Foresees roadblocks that interrupt priorities and proactively finds solutions to the root cause; focuses on the solutions and outcomes ☐ Helps others to clarify priorities, anticipate issues, overcome distractions, and achieve desired results; challenges others who wander from the stated goal; viewed as someone who is clear and focused ☐ Schedules time for the important matters and/or priorities while addressing urgent issues as needed; eliminates busywork to create more time to focus on greater priorities

Planning and Organizing

Definition: Effectively uses resources (e.g., people, time, funding, material, support) to systematically approach and complete tasks, assignments or projects).

Limiting Demonstrates behaviors that show a need for more experience and opportunities for development.	☐ Performs tasks, assignments, and projects with minimum planning; sketches out plan at last minute; lacks perspective of interrelatedness of tasks/goals. ☐ Tends to be inflexible and is not open to suggestions and input; has difficulty adapting ☐ May not know how to combine or stagger multiple activities to achieve desired outcomes in an organized way ☐ Relies on established systems and processes for prioritizing and delivering on tasks/assignments; finds it complicated to organize work without processes in place
Contributing Demonstrates behaviors that meet performance expectations while supporting team and customer needs.	☐ Coordinates and organizes tasks/projects for self and others; evaluates and understands time requirements, complexity, and difficulty of tasks/projects ☐ Manages competing and changing assignments efficiently in support of management and others; sets up task, assignment, and project timeline ☐ Coordinates effective allocation and use of resources; prepares for administration and implementation by obtaining adequate resources; anticipates and adjusts for problems and the unexpected ☐ Consistently evaluates priorities and plans ahead to meet important deadlines; acts, follows up and monitors the progress of own work and if applicable staff assignments
Advancing Demonstrates behaviors that show high levels of expertise and contribute to office- and agency-wide initiatives.	☐ Coordinates people and resources to achieve goals for the unit, department and/or organization with a high level of proficiency ☐ Plans ahead with vision; responds timely to challenges, issues, difficulties, and roadblocks and develops an appropriate plan of action to facilitate tasks ☐ Coordinates and implements multiple and complex assignments concurrently; able to shift direction as necessary ☐ Monitors progress to achieve short and long-term goals; evaluates results, improvises as necessary, and provides feedback on progress

Solving Problems

Definition: Accurately assesses problems and effectively applies a variety of resources to arrive at quality solutions.

Limiting Demonstrates behaviors that show a need for more experience and opportunities for development.	☐ Uses limited experience and few sources of information when solving key problems; may not consult with others or research alternatives, when appropriate to do so ☐ Tends to be emotionally attached to their own solutions without demonstrating an openness to other alternatives ☐ May not use a reflective approach when dealing with problems or when evaluating different options/solutions ☐ Tends not to challenge assumptions, actions, or decisions even when in doubt; typically sticks with past solutions when a need for different outcomes require new solutions
Contributing Demonstrates behaviors that meet performance expectations while supporting team and customer needs.	☐ Asks meaningful and relevant questions to understand the problem; questions established ways of doing things; challenges the status quo ☐ Knows when to use and how to balance logical reasoning with intuition when problem solving; able to use both effectively ☐ Consults with others to improve decisions, or determines appropriate solutions and seeks answers to key questions ☐ Understands cause and effect relationships; identifies root causes of problems/issues; breaks large problems down into smaller, more manageable components
Advancing Demonstrates behaviors that show high levels of expertise and contribute to office- and agency-wide initiatives.	☐ Goes beyond traditional ways to address problems and issues; thinks critically, conceptually and creatively on a "big-picture" level when solving problems ☐ Anticipates likely consequences of actions/decisions on multiple parts of the organization and helps others understand them as well ☐ Actively addresses high impact problems; incorporates broad knowledge and creative thinking to support analysis of difficult or long-term problems ☐ Knows strengths of own style and how various styles and viewpoints of others add value to an effective decision; engages and utilizes the strengths and perspectives of others to arrive at sound solutions to difficult problems

Thinking Strategically

Definition: Anticipates and plans for future events, problems and opportunities, and creates competitive plans/strategies that lead to desired results.

Limiting Demonstrates behaviors that show a need for more experience and opportunities for development.	☐ May not be comfortable thinking or talking strategically; unable to link ideas to key initiatives that drive organizational success ☐ May think or talk about the need (for self or team) to be strategic but is challenged to know what strategic efforts to take ☐ Tends to be overly tactical and reactive; addresses short term needs more than long term, broad-based, strategic issues ☐ Lacks the organizational perspective and the strategic thinking experience needed to pull together a coherent strategic view and vision for the future
Contributing Demonstrates behaviors that meet performance expectations while supporting team and customer needs.	☐ Collaborates across departments and offices; understands and discusses agency business needs; aligns processes to support the agency mission ☐ Understands the long-term impact of key initiatives and positions them for proper visibility and ability to add value ☐ Contributes to strategic discussions to break down silos and focus on agency goals ☐ Asks probing questions and makes an effort to ensure that work of the team is linked to larger office and agency strategy
Advancing Demonstrates behaviors that show high levels of expertise and contribute to office- and agency-wide initiatives.	☐ Accurately anticipates future organizational challenges and trends; recognizes when it's time to shift strategic direction ☐ Develops long term strategies and translates them into business plans; articulates a clear vision and key organizational priorities ☐ Builds partnerships that have relevant and long term impact on the organization; incorporates organization's strengths, weaknesses, opportunities and threats into strategy ☐ Makes connections between seemingly disparate ideas and applies them in support of the strategy; helps other stakeholders think and act more strategically by understanding relevant connections

Technical Expertise

Definition: Possesses a specialized body of knowledge, skill or abilities to apply in a specific position or consultant role

Limiting Demonstrates behaviors that show a need for more experience and opportunities for development.	☐ Overuses technical and functional expertise at the expense of personal and team relationships or, in the case of managers, employee development opportunities ☐ Demonstrates basic skills but needs to strengthen program knowledge to be effective ☐ Follows set process steps but has difficulty adapting to exceptions or problems ☐ Needs to update program- or job-specific skills. Tends to rely on outdated processes and information.
Contributing Demonstrates behaviors that meet performance expectations while supporting team and customer needs.	☐ Exceeds the minimum knowledge and skills required to perform role ☐ Routinely demonstrates ability to apply specialized knowledge to address issues or situations ☐ Attends learning events to stay abreast of current or emerging trends in field ☐ Recognizes the interdependence of his/her role with others in the unit, section or bureau by working across silos
Advancing Demonstrates behaviors that show high levels of expertise and contribute to office- and agency-wide initiatives.	☐ Demonstrates mastery and considered an expert on the knowledge, skills and abilities defined in the position description ☐ Routinely assists others in developing or applying technical expertise ☐ Recognizes and champions trends and best practices in field of technical expertise and is able to adapt to meet agency needs ☐ Often recommends more effective application of technical expertise to improve processes and increase efficiencies

Technological Knowledge

Definition: Uses core applications for emails and documents and agency specific applications to accomplish job requirements

Limiting Demonstrates behaviors that show a need for more experience and opportunities for development.	☐ Tends to rely on paper processes and resists switching to computer applications and related equipment ☐ Demonstrates a basic understanding of applications essential to role ☐ Tends to delay opportunities to learn or adopt new technology ☐ Presents data based on personal preference instead of considering the target audience's needs
Contributing Demonstrates behaviors that meet performance expectations while supporting team and customer needs.	☐ Effectively chooses the appropriate technology for a task and demonstrates ease with using technology required in daily work ☐ Attends courses and seminars and applies new skills to daily work ☐ Recommends resources on the Internet to support others ☐ Uses audience and topic appropriate tools to gather and share information with team
Advancing Demonstrates behaviors that show high levels of expertise and contribute to office- and agency-wide initiatives.	☐ Acts as a subject matter expert by advising others on application specific best practices ☐ Increases efficiencies ways by using an array of electronic formats ☐ Demonstrates technical agility by using a variety of software and techniques to create customer focused documentation ☐ Creates exceptional work products using a variety of word-processing or data analysis techniques

Results Orientation

Definition: The ability to link processes and practices to positive outcomes and to demonstrate the value that HR brings to the organization.

Limiting Demonstrates behaviors that show a need for more experience and opportunities for development.	☐ Sets unrealistic goals – goals that are either too easy or too difficult to achieve ☐ Focuses time, energy, and other resources on activities that are not aligned with the team's objectives ☐ Occasionally becomes sidetracked on less important matters when obstacles present themselves ☐ Completes tasks late or with poor quality due to lack of planning or balancing of commitments
Contributing Demonstrates behaviors that meet performance expectations while supporting team and customer needs.	☐ Establishes clear, specific performance goals, expectations, and priorities ☐Aligns the efforts of him/herself and the team to the team's objectives ☐ Works around typical problems and obstacles to get results ☐ Manages own time well in order to complete allocated tasks on time and with high quality
Advancing Demonstrates behaviors that show high levels of expertise and contribute to office- and agency-wide initiatives.	☐ Identifies "vital few" goals and allocates time and resources accordingly to achieve those goals when faced with competing priorities ☐ Recognizes when others have set goals that are misaligned with the State's objectives and provides guidance/coaching to team members to better meet the needs of the team and its customers ☐ Navigates quickly and effectively to resolve problems and obstacles, even when complex and unique circumstances occur ☐ Manages own time exceptionally well and frequently completes tasks early and with higher-than-expected quality

Leadership

Definition: Uses administrative ability and skills to measure results and strategically focuses on the mission of the division and of the agency to achieve appropriate results; provides a common vision and clear direction by clarifying roles and responsibilities for your team

Limiting Demonstrates behaviors that show a need for more experience and opportunities for development.	☐ Fails to generate new and creative approaches or identify new approaches that are ineffective or unfeasible ☐ Verbalizes support for a change initiative but does not show enthusiasm, confidence, and belief in the change through actions ☐ Establishes departmental goals but does not establish or communicate individual accountabilities toward reaching those goals ☐ Does not consistently provide employees with the resources they need to accomplish their goals
Contributing Demonstrates behaviors that meet performance expectations while supporting team and customer needs.	☐ Establishes departmental and individual goals; Clearly communicates departmental and individual goals and accountabilities ☐ Provides adequate resources for employees to accomplish their goals up front and upon request of employees; removes barriers as needed to help accomplish team goals ☐ Effectively applies existing practices or processes to new work situations that result in higher quality work products or enhanced efficiency ☐ Shows enthusiasm and confidence in new ideas, generating support for change initiatives among co-workers
Advancing Demonstrates behaviors that show high levels of expertise and contribute to office- and agency-wide initiatives.	☐ Develops creative and highly effective ways of doing work to enhance efficiency and quality of work/services provided by the State ☐ Energizes others to generate support within the workforce for changes that enhance efficiency or the quality of work products ☐ Establishes departmental and individual goals; Directs individuals to focus on the most vital departmental goals to maximize personal success within the department ☐ Monitors employee progress and proactively makes adjustments in resource allocations; proactively removes barriers to help accomplish team goals

Effective Communication

Definition: Being able to verbally or in writing convey messages in terms that make sense, and also to actively listen to others' interpersonal communications.

Limiting Demonstrates behaviors that show a need for more experience and opportunities for development.	☐ Talks over others; demonstrates an unwillingness to listen to others and is "stubborn" in holding on to his/her own perspective without considering other people's views and insights ☐ Takes inappropriate action because he/she misinterprets written and/or oral information and directions ☐ Tends to conceal information or "hold ideas close to the chest" ☐ Assumes others understand what he/she is trying to communicate and moves forward in his/her communications without confirming others in understanding
Contributing Demonstrates behaviors that meet performance expectations while supporting team and customer needs.	☐ Actively listens to co-workers and customers to put him/herself in other people's shoes to gain a better understanding of what they are saying ☐ Comprehends written and oral information and direction and takes appropriate action ☐ Communicates intentions, ideas and feelings openly and directly ☐ Listens attentively to the speaker and actively asks questions to confirm understanding and avoid miscommunications
Advancing Demonstrates behaviors that show high levels of expertise and contribute to office- and agency-wide initiatives.	☐ Presents an open and accepting persona that allows even the most reluctant person to express his/her views ☐ Assists others in comprehending written and oral information and directions so they can take appropriate action ☐ Encourages an open exchange of ideas and different points of view; tells the truth even when it is unwelcome ☐ Demonstrates a keen ability to recognize when others are having difficulty understanding his/her messages and adapts style appropriately (e.g., provides examples)

Cross-Cultural Intelligence

Definition: Knowledge of and sensitivity to differences among cultures.

Limiting Demonstrates behaviors that show a need for more experience and opportunities for development.	☐ Does not recognize cultural differences; may use unfounded stereotypes to develop an understanding of others ☐ Occasionally treats people differently depending on culture, gender, race, socioeconomic, or other factor(s) ☐ Works well with people who are similar to him/her but has difficulty working with people who have different backgrounds ☐ Sometimes makes statements that are offensive or insensitive
Contributing Demonstrates behaviors that meet performance expectations while supporting team and customer needs.	☐ Recognizes cultural differences among people and effectively works to bridge cultural gaps ☐ Treats all people with dignity and respect regardless of cultural or socioeconomic background ☐Effectively works with people of diverse backgrounds regardless of personal differences that may exist ☐Avoids making statements that may offend or hurt others from different cultural or socioeconomic backgrounds
Advancing Demonstrates behaviors that show high levels of expertise and contribute to office- and agency-wide initiatives.	☐ Develops strategies for overcoming even the most challenging cultural differences to achieve common goals ☐ Actively seeks to eliminate "out groups" so that all people feel included and are free to be themselves ☐ Thrives within the context of diverse teams; capitalizes on diversity to find creative solutions and encourages other team members to leverage the diverse talents of agency/state staff ☐ Consistently communicates even the most difficult messages in a sensitive and supportive manner without compromising on the meaning of the message

Analytical/Critical Thinking

Definition: Seeking information and using that information to inform decision and resolve problems.

Limiting Demonstrates behaviors that show a need for more experience and opportunities for development.	☐ Spends a long time reviewing information which results in delays ☐ Does not proactively move forward to take action on team and personal responsibilities; typically needs more direction or information than other team members ☐ Tends to jump to solutions without fully analyzing and understanding problems ☐ Typically follows the judgments of others without independent thought and analysis
Contributing Demonstrates behaviors that meet performance expectations while supporting team and customer needs.	☐ Analyzes problems effectively and makes appropriate decisions without missing deadlines or causing delays in service ☐ Is able to cope with uncertainty and an incomplete set of facts to develop a feasible and effective solution ☐ Uses established standards/methods to solve common problems; responds to recurring problems by investigating the underlying causes and taking steps to eliminate them ☐ Independently analyzes issues and problems and expresses his/her opinion to others
Advancing Demonstrates behaviors that show high levels of expertise and contribute to office- and agency-wide initiatives.	☐ Demonstrates an ability to make effective decisions within limited time ☐ Develops highly creative and effective solutions despite the absence of information and short time-frames ☐ Focuses on continuous improvement by exploring opportunities for enhancing, revising or modifying existing standards/methods and developing proposals for implementing changes ☐ Is persistent in his/her analysis of issues and problems to find solutions that best serve the State

Acting Decisively – Development Guide

Tips for Development Experiences

1. Indecisiveness may result in the perception that you cannot make choices or take a stand on issues. The following process may help you increase your ability to take immediate and independent action:
   a. Make a list of the major areas in which you have decision-making responsibility.
   b. Identify the areas in which you tend to divert responsibility for decision making.
   c. Ask yourself "why"
   d. Analyze your concerns about making the decision. Find common patterns. For example, you may be uncomfortable making decisions involving technical areas with which you are unfamiliar, or you may delay making decisions on issues important to your manager.
   e. If you turn to others immediately, before you've formulated options, ask yourself why. Do you need more information? If so, gather the facts you need and formulate alternatives on your own.
   f. If you tend to procrastinate on deadlines, make a commitment to arrive at a major decision by a certain date. For minor decisions, make your judgments within a few minutes.
2. Set a limit on how much time you will invest in gathering information. When you have reached that limit, make a decision.
3. To make decisions quickly, it is helpful to learn new information quickly. Find websites that will give you some data for your decision and utilize colleagues who will be a sounding board for your concerns.
4. Use Google or other online search engines to acquire information needed to make quick decisions and to have some confidence that they are supported.
5. Make sure that you have measurable goals and objectives (SMART goals); then, focus on results, not activity for activity sake. Getting too caught up in activities can cloud your focus on results. Make sure that you clearly understand your organization's strategic goals and how they relate to business unit goals.
6. Monitor your results frequently against your goals. Reward yourself when you meet or exceed your goals. If you consistently fail to meet your goals, evaluate your goal-setting methods and set new targets. Get feedback from your supervisor and colleagues.
7. Challenge yourself and others to do better without minimizing what you or they have already accomplished. Support the work activities of others.
8. Focus your efforts on high-payoff activities and goals that others, such as your management team, deem important and critical.
9. Keep others informed about what you are doing.
10. Check to see if your concerns about people, accuracy, quality, and so on, are seen as not putting a priority on getting results. Ask for feedback about this. Find a way to make these concerns compatible with achieving strong results.

Acting Decisively – Continued

<u>Books</u>

- Blink: The Power of Thinking Without Thinking – Malcolm Gladwell
- 60 Second Strategist: How to Take Decisive Action Today While Planning for Tomorrow – Tony Galliano
- Judgment: How Winning Leaders Make Great Calls – Noel M. Tichy & Warren Bennis
- How to Get Your Point Across in 30 Seconds or Less – Milo O. Frank
- Time Management for Dummies – Jeffrey J. Mayer
- Office Superman: Making Yourself Indispensable in the Workplace – Stephen Lucas
- How to Run a Meeting in Half the Time – Milo O. Frank
- The Art of Public Speaking – Stephen Lucas
- Find Your Perfect Work: The New Career Guide to Making a Living, Creating Life – Paul & Sarah Edwards
- Time Efficiency Makeover – Dorothy Breininger & Debby Bitticks

<u>Developmental Relationships</u>

- Ask a colleague to give you ideas on how to strike a balance between planning and execution.
- Approach a colleague who displays this competency and ask them for feedback and approaches used to make decisive and effective decisions.
- Practice making decisions by developing alternative courses of action. Then, discuss with your supervisor and request feedback in order to learn a process, develop competence, and increase your level of confidence.

<u>Instructor-Led Training Resources</u>

- DAS Learning Resources
- John Glenn School – MAPS courses
- OHFA Employee Development Workshops

Acting with Integrity – Development Guide

Tips for Developmental Experiences

1. Know what guides your integrity. This will be like a compass for you. Values such as truthfulness and follow-through are often core for us. Additionally, the organization also has values that help serve as a compass. Among criteria you might want to consider OHFA's purpose and its strategic intent. Or ask your manager and then be willing to speak up on situations and/or decisions that you believe are worth the effort
2. When you are bothered by something you believe is unjust, write it down in a private journal. After a few weeks of capturing things that bother you, look at the pattern of your concerns. Then consider doing any of the following:
   a. Analyze whether they cluster around one or two issues or people.
   b. Ask to meet with your boss to discuss your concerns and ask for help
   c. Look for tips in other competencies to help you communicate your concerns (e.g., Building Productive Relationships, Informing)
   d. For each concern write down any fears you have for standing up for what you believe is right
   e. Discuss your concerns privately with a trusted colleague
3. Practice telling the truth, sharing dilemmas and mistakes and then sharing the lessons you learned. If you are a manager, being open about your dilemmas and mistakes will encourage your staff to listen, learn and hopefully trust that they can be open about their concerns.
4. Keep commitments. It's the quickest way to build trust in any relationship – be it with an employee, boss, team member, customer or public.
5. Make every attempt to be consistent with your professional standards by demonstrating them through core values and with a sense of visible ethics.
6. When you find yourself in a situation that you don't know what to do ethically, seek help. Involve your manager, legal counsel, or use a colleague as a sounding board.
7. By telling the truth and taking responsibility for your own actions, you gain trust from others.
8. Solicit and seek feedback from others who can discern your honesty and ethical priorities. Take time to talk to them privately. Be a good listener and be willing to utilize the information for your benefit.
9. Be aware of any internal conflicts and/or limitations that present challenges or struggles that reflect mixed messages to others and can cause feelings of mistrust.

Acting with Integrity – Continued

Books

- A Practical Guide to Ethics: Living and Leading by Integrity – Scott Stroud
- The Seven Layers of Integrity – George P. Jones
- Take Charge of Your Mind: Core Skills to Enhance Your Performance, Well-Being, and Integrity at Work – Paul, John, and Selby Hannam
- Leading People – Robert H. Rosen
- The Healthy Company: Eight Strategies to Develop People, Productivity, and Profits – Robert H. Rose, Ph.D.
- The Art of Public Speaking – Stephen Lucas
- The Big Book of Team Building Games: Trust-Building Activities, Team Spirit Exercise, and Other Fun Things to Do – John Newstrom & Edward Scannell
- Becoming Who You Were Born to Be – Brian Souza
- A Life that Counts – John Maxwell

Developmental Relationships

- Ask a colleague to give you ideas on how to build integrity
- Talk with a colleague you have developed a relationship with on how to build professional and/or organizational standards. Have them show you how to be consistent with these standards
- Use a colleague as a sounding board on how to take action when challenged by ethical dilemmas
- Ask your supervisor or a colleague how to set core values and beliefs that are in alignment with the same ones within the organization.

Instructor-Led Training Resources

- DAS Learning Resources
- John Glenn School – MAPS courses
- OHFA Employee Development Workshops

Building Productive Relationships – Development Guide

Tips for Developmental Experiences

1. Obtain a directory of people in other departments that you do business with. From the list, identify up to five people you'd like to get to know better. Invite them to lunch or meet for coffee. Explore areas of common concern and interest and if appropriate collaborate on a work initiative.
2. When you hear or read confusing or conflicting messages, confront the inconsistency and work to clarify the misunderstanding
3. If you know your Myers-Briggs Type Indicator (MBTI) style, call DAS Employee and Organizational Development (EOD) to access information about understanding how your style tends to interact with others. If you do not remember your MBTI style, contact DAS EOD to sign up for the next workshop. With relationships you would like to improve, practice adapting your communication style to better connect with the needs of the situation. Try to understand the differences of how the big picture versus the detail people want to receive may impact your interaction with someone.
4. Practice non-judgment. Accept people as they are, not as you want them to be.
5. Review the book, "Making Judgments Without Being Judgmental" by Terry D. Cooper to learn more about: being assertive, not aggressive, making judgments without being judgmental, and being open-minded and reflective versus using clichés and sound-bites.
6. Recognize contributions of your colleagues and staff. Take time to thank people.
7. Build trust by showing fundamental respect for people and demonstrating caring and concern. Ask yourself, "Do I treat people well whether or not they can do anything for me?"
8. Serve as a liaison between the people you work most closely with and the leaders of a key project, department or management.
9. The next time you are in a conversation where people start criticizing someone who is not present, consider what behaviors create trust. You could participate in the discussion. Trustworthy behaviors would be to leave or stay, but remain silent. The most trustworthy behavior would be to say something positive about the person or say you do not feel comfortable talking about a person when he or she is not there.
10. Build rapport and trust by: thanking people or apologizing when appropriate, giving people the benefit of the doubt, convey a willingness to understand, an openness and desire to build trust.

Building Productive Relationships – Continued

Books

- People Skills: How to Assert Yourself, Listen to Others, and Resolve Conflicts – Robert Bolton
- Masters of Networking: Building Relationships for Your Pocketbook and Soul – Ivan R. Misner and Don Morgan
- The Seven Habits of Highly Effective People – Stephen Covey
- Crucial Conversations: Tools for Talking When Stakes are High – Kerry Patterson
- Conversationally Speaking: Tested New Ways to Increase Your Social and Interpersonal Effectiveness – Alan Garner
- The Female Advantage: Women's Ways of Leadership – Sally Helgesen
- Liberating the Human Spirit in the Workplace – William Bickham
- Managing From the Heart – H. Bracey, J. Rosenblum, & A. Sanford
- Fierce Conversations: Achieving Success at Work & in Life, One Conversation at a Time – Susan Scott
- Cracking the Corporate Code: The Revealing Success Stories of 23 African-American Executives – Price M. Cobbs & Judith L. Turnlock

Developmental Relationships

- Share your development relationship goal with a colleague who knows you well and ask for periodic feedback about whether they see you making progress toward your goal.
- Rehearse or role play a difficult message with a trusted colleague before meeting with the real person.

Instructor-Led Training Resources

- DAS Learning Resources
- John Glenn School – MAPS courses
- OHFA Employee Development Workshops

Continuously Improving Quality – Development Guide

<u>Tips for Developmental Experiences</u>

1. Approach issues differently by drawing problems rather than writing them. Drawing works well with images, concepts, and intuition; whereas, writing works well with facts, numbers and logic.
2. Maintain a quality issues log to document types of issues, resolutions, and results and then review to discover trends, patterns, or categories to determine root causes. Use quality tools such as check sheets, charts and graphs, and cause and effect diagrams (fishbone diagrams). Focus on appropriate information to avoid getting bogged down with unnecessary detail.
3. Encourage co-workers to work together by listening to others' ideas and input to learn and apply by "seeking first to understand" others' perspectives, then "be understood." (Seven Habits of Highly Successful People by Stephen Covey)
4. Learn more about how Kaizen methodology and Lean-Sigma processes have helped improve quality throughout the agency and State. Explore whether there are process improvement initiatives in your unit that may benefit from Kaizen.
5. Contact DAS to request help flow-charting and process mapping your workflows. Learn how to map processes with your team mates and how to assess these maps for opportunities to enhance quality and timeliness, as well as minimizing duplications and streamlining processes.
6. Adopt the philosophy of being a lifelong learner by reading, taking classes, seminars, working with a coach, etc. to foster innovation and out-of-the-box thinking.
7. Challenge "status-quo" and "business as usual" thinking to mitigate organizational barriers to innovation by making a list of new ideas, concepts, techniques regarding how things could be done differently. Support others who "challenge the status quo" and try to innovate.
8. Work diligently to ensure tasks are done "right" the first time by getting customers' input, sharing that input with your manager and colleagues, or volunteering to be on a process review team.
9. Involve people who are subject matter experts and stakeholders to get different perspectives and examine pros and cons to maximize buy-in and minimize resistance to process improvement. Involve co-workers in a discussion regarding recommendations the group could suggest.

Continuously Improving Quality – Continued

Books

- Productive Workplaces: Organizing and Managing for Dignity, Meaning & Community – Marvin Weisbord
- The Goal: A Process of Ongoing Improvement – Eliyahu M. Goldratt
- Process Mapping, Process Improvement, and Process Management – Dan Madison
- Out of Crisis – W. Edwards Demming
- The Demming Management Method – Mary Walton
- Seven Habits of Highly Effective People – Stephen Covey
- A Whack on the Side of the Head (How You Can Be More Creative) – Roger Von Oech
- The Speed of Trust – Stephen M.R. Covey
- Creating Customers for Life – Eberhard E. Scheuing

Developmental Relationships

- Ask a supervisor or manager to be an advocate or sponsor on one of your quality ideas.
- Support colleagues who challenge assumptions and question the way things are done
- Ask your colleagues how your idea could be implemented in your area

Instructor-Led Training Resources

- DAS Learning Resources
- John Glenn School – MAPS courses
- OHFA Employee Development Workshops

Developing Staff & Others – Development Guide

<u>Tips for Developmental Experiences</u>

1. Create a culture where staff understands the reasons for and resources available for development
   a. Contact Employee And Organizational Development (EOD) areas within Employee and Business Services (EBS) to learn about resources available to support development of staff.
   b. Encourage employees to use some of the career development resources available through the Office of Employee and Organizational Development (EOD).
   c. Help employees understand that you are there to support their development but it is their job to own their development plan and take relevant initiative.
2. Get to know people and make a point to know and understand their career goals and strengths.
   a. Discuss the employees' strengths and weaknesses, career goals, and their investment in the process.
   b. Show an interest in the employee and support the employee's growth and development.
   c. As employees do their share to identify their strengths, help them to find opportunities to actively deploy those strengths.
   d. Help employees understand which of their behaviors get in the way of them fully using their strengths. Remind them to manage weaknesses that get in the way of deploying strengths.
3. Hold regular development discussions with employees.
   a. Hold an annual appraisal meeting that provides an accurate picture of the employee's strengths and weaknesses. Discuss the next job or jobs the person may wish to aspire or a competency he/she wishes to develop.
   b. In addition to the annual appraisal hold regular development discussions regarding opportunities and resources to grow and improve.
   c. Coach employees to align individual's goals and strengths with organizational needs.
   d. Express confidence in employees' ability to succeed but also be honest with them and constructively share ineffective performance and behaviors.

Developing Staff & Others – Continued

Books

- Managers as Mentors – Building Partnerships for Learning – Chip R. Bell
- The Leadership Pipeline: How to Build the Leadership Powered Company – Ram Charan
- Creating a Culture of Successes: Fine-tuning the Heart & Soul of Your Organization – Charles B. Dygert
- Managing from the Heart – Hyler Bracey
- ACT ON IT! Solving 101 of the Toughest Management Challenges – Sam Deep
- Coaching, Mentoring, and Managing: Breakthrough Strategies to Solve Problems & Build Winning Teams – Micki Holliday
- The Mentor's Guide: Facilitating Effective Learning Relationships – Lois Zachary
- The Leadership Experience – Richard L. Daft
- The One Minute Manager Meets the Monkey – Kenneth Blanchard

Developmental Relationships

- Ask your manager how to provide input and pointers regarding developing your staff.
- Work with a colleague to help you become a more effective staff developer.
- Network with your peers for ideas and approaches for staff development.
- Start a managers' group to network and meet regarding becoming more effective at coaching, developing, and mentoring staff.

Instructor-Led Training Resources

- DAS Learning Resources
- John Glenn School – MAPS courses
- OHFA Employee Development Workshops

Directing & Measuring Work – Development Guide

Tips for Developmental Experiences

Being asked to accomplish more work with fewer resources is now the norm. Knowing the talents of your staff and then setting clear objectives, clarifying responsibility and accountability and having measures in place are essential to effectively utilizing your staff. The following tips will help you with the process of directing and measuring work.

1. Decide which work should be done by staff members other than you. Not all tasks are appropriate to assign to subordinates. Consider the following questions when deciding what to delegate:
   a. Is the task or assignment visible, sensitive or have high political implications?
   b. Is this task/assignment very confidential or sensitive and assigning it to a subordinate would jeopardize confidentiality?
   c. Were you specifically told by your manager to complete the task yourself?
2. Select a team member to assign the task or project.
   a. Match task to interests and skills
   b. Balance challenge with support
   c. Be sure not to overload a particular member
   d. Consider developmental needs
   e. Consider which employees would excel at a stretch assignment
3. Communicate the big picture.
   a. Assign the person a whole task to complete
   b. If you can't give the employee a whole task, make sure they understand the overall purpose of the project or task
4. Ensure that your staff members understand exactly what you are asking them to do.
   a. Spell out the specifics of the task
   b. Identify priorities within the task
   c. Clarify degree of authority
   d. Identify constraints
   e. Identify the measurements or the outcome you will use to determine that the project was successfully completed
5. Agree on deadlines.
   a. Set overall project or task deadlines
   b. Agree on how often update meetings will occur
   c. Discuss other people that need to be involved and the deadlines they should follow
   d. Explain how the task fits in with the larger timeline for the whole project
6. Be accessible for employees but do not check in with them constantly.

a. Let go of the assignment and let your staff handle it
b. Convey your support and trust in their abilities to complete the work
c. Answer questions as quickly as possible
d. Encourage employees to find their own solutions to barriers
e. Make sure they have what they need to do the job, and that they're getting the necessary assistance and cooperation from others

7. Maintain boundaries and do not micromanage.
a. Once you have delegated a task, do not interfere with how the work is being done
b. Keep number of update meetings to a minimum
c. Keep all progress sessions and updates brief and well organized
d. Do not take over when a subordinate becomes overwhelmed or discouraged. Discuss the barriers, offer support and ask questions.

8. Follow up.
a. Attend update meetings as agreed upon
b. Record performance and offer appropriate & honest feedback
c. Allow for mistakes

Books

- How to Delegate –Robert Heller
- Balanced Scorecard Step by Step: Maximizing Performance and Maintaining Results – P. R. Niven
- Managing & Measuring Performance in Organizations – Robert Austin
- Managing at the Speed of Change: How Resilient Managers Succeed and Prosper Where Others Fail – Daryl R. Connor
- The Leader-Manager: Guidelines for Action – William Hitt

Developmental Relationships

- Talk to your colleagues about being an accountability partner for you
- Each time they see you performing a task that your staff could or should do, they should bring it to your attention
- Discuss ways you may be able to use some of your stronger competencies to help compensate for your discomfort in Managing & Measuring Work.

Instructor-Led Training Resources

- DAS Learning Resources
- John Glenn School – MAPS courses
- OHFA Employee Development Workshops

Focusing on Customers – Development Guide

Tips for Developmental Experiences

1. When you recognize that the need of a customer is more than what you expected, take time to listen to the customer complaints without being defensive; provide as much feedback as possible. If necessary, refer customer to manager for further action.
2. Open communication is the channel to finding out what the customers want and need and what's working and what's not. Ask your customers how you are doing and how you can improve. Keep a journal of their comments for future use.
3. Always maintain an "open door" for your customers. This builds a stronger relationship with them. It also helps to earn their trust and respect.
4. Be responsive by returning calls or messages from your customers as soon as possible or within 24 hours.
5. As you work to improve and increase customer satisfaction, keep in mind that your division or department is part of the whole organization.
6. There are times when you are unable to accommodate customer demands. Avoid just giving them "yes" or "no" answers to their requests. Act upon customer needs by:
   a. Taking time to understanding emerging trends
   b. Asking relevant questions
   c. Recommend solutions to upcoming challenges
   d. Maintain consistent contact and genuine concern with the customer
7. When faced with difficult situations with customers, engage team members in exploring customer needs and regularly suggest possible input, ideas and actions that contribute to significant improvement in the customer experience.
8. When addressing a customer's need, let the customer know what your specific actions are going to be and make it clear that you will follow up.
9. Always work to anticipate customer needs by identifying who your customer is, what they expect from you, how you can meet their needs, and ensure that your customer's needs are being met or exceeded.
10. To avoid being blindsided by customer problems, make sure you have examined the issue up front and have identified a solution to how you will respond to the service needed.

Focusing On Customers – Continued

Books

- The Experience! How to Wow Your Customers and Create a Passionate Workplace – Lior Arussy
- Breaking Through Bureaucracy – Michael Barzelay
- The Speed of Trust – Stephen M.R. Covey
- Creating Customers for Life – Eberhard E. Scheuing
- The Big Book of Team Building Games – John Newstrom
- Reinventing Government: How the Entrepreneurial Spirit is Transforming the Public Sector – David Osborne

Developmental Relationships

- Discuss customer service challenges with your team mates. Together, explore challenges and possible solutions. Commit to sharing among team members helpful customer service tips and solutions for common challenges
- Ask your manager/supervisor for ideas on how to identify, anticipate, and understand customer service needs.
- Ask your coworkers their ideas and suggestions for focusing on customers. Ask them "How are you doing? How can you improve?"
- Take time to solicit feedback from managers or coworkers on the strengths and possible weaknesses on customer service.
- Ask for coaching on how to deploy your strengths and how to manage your weaknesses concerning customer service.

Instructor-Led Training Resources

- DAS Learning Resources
- John Glenn School – MAPS courses
- OHFA Employee Development Workshops

Informing – Development Guide

Tips for Developmental Experiences

1. Share thoughts, ideas, and information in team meetings and daily group or individual interactions. Provide not only information but also rationales or logic behind thoughts.
2. Share information regularly to get folks involved; gain feedback from those impacted by events, projects and programs; and provide information so others can perform their jobs better and have a sense of the big picture. Others may have ideas or information that could help you or your unit is more effective and customer service oriented.
3. Strong communicators speak frequently but only briefly. Additionally, strong communicators:
   a. Ask questions and do not offer solutions early in an interaction.
   b. Highlight their viewpoints or information briefly.
   c. Seek others' viewpoints and then share their own thoughts.
   d. When encountering conflicting or mixed messages, work to resolve or clarify any misunderstandings.
4. When talking or sharing information and viewpoints with others:
   a. Avoid words or phrases that annoy folks such as "you know" and "uh."
   b. Speak calmly rather than too fast, loudly, or forcefully.
   c. State ideas or information concisely and to the point.
   d. Create a verbal or visual picture or use an example or analogy to make it easier for listeners to understand and remember viewpoints or information.
5. When informing others whether one-on-one, small groups, or more people, consider the audience and situation. Adjust the style, message, and method of delivery. Consider the following:
   a. Is it a complex issue that might be better communicated in writing with background?
   b. How receptive will the audience be to the message? Will persuasive points and rationales need to be provided?
   c. Do you need to disseminate information quickly through the use of e-mail?
   d. What is your most effective style of delivery? Is that the most practical way to deliver the information?
6. Share information with those who need to know or can benefit from the information. When sending emails, avoid the temptation of sending a mass email that includes people that do not really benefit from this information.

Informing – Continued

Books

- Communicating Effectively – Lani Arredondo
- Communicating in Groups: Building Relationships for Effective Decision Making – Joann Keyton
- On Communicating – Mark McCormack
- The Administrator's Guide to Personal Productivity: With the Time Management Checklist
- The Manager's Problem Solver – Fred E. Jandt
- ACT ON IT!: Solving 101 of the Toughest Management Challenges – Sami Deep
- How to be a Great Communicator – Nido Qubein
- Fierce Conversations: Achieving Success at Work & in Life, One Conversation at a Time – Susan Scott

Developmental Relationships

- Ask your manager to provide feedback regarding you communication style in verbal, written or electronic mediums.
- Ask your supervisor to let you know the types of information in which he or she is most interested. Make sure your supervisor does not get any surprises that may have a negative impact or reflect poorly on your unit.
- Ask your supervisor to provide more opportunities to increase the number of communication tasks in order to improve interpersonal, written and presentation skills.
- Talk with team members about how information sharing can be increased and improved on a daily basis. Ask them what types of information would help them to perform their jobs more effectively.

Instructor-Led Training Resources

- DAS Learning Resources
- John Glenn School – MAPS courses
- OHFA Employee Development Workshops

Leveraging Organizational Resources – Development Guide

Tips for Developmental Experiences

1. To be successful in understanding and becoming familiar with the agency's goals, do your homework by obtaining OHFA's vision and mission statement, the goals and values, and any strategies. This knowledge will empower you and enable you to empower others.
2. Study the agency's goals and strategies and identify how your work and the work of your team support those goals and strategies. Use that linkage to help support your agenda.
3. Set up small meetings with key supervisors or managers or colleagues to discuss OHFA's goals and strategies, as well as the organization's strengths and weaknesses from their point of view.
4. After attending the meeting in which you obtained this information, meet with the person(s) to see what was learned and what questions remain.
5. When your supervisor or manager is unable to attend any meeting, ask to be a "stand-in." This will enable you to become familiar with the agency and the agency structure.
6. Take your values and competencies and build your profile so that you can meet with your supervisor or manager and bring focus on all the competencies to help create a core action plan. This can aid with showing your willingness to move outside of your "comfort zone."
7. Make a list of things that you can identify that affects your job. This will help you sort out where the lack of resources and information exist.
8. Make every attempt to be consistent with assessing people and other channels of information by attending meetings and any other sessions that can increase your agility.
9. Ask key stakeholders and Office program managers across the agency to share resources and information about OHFA.
10. Utilize your strengths (e.g., innovating, navigating organizational politics, thinking strategically) to help become aware of challenging personalities, agency issues, and key priorities across various offices.
11. Seek opportunities to become a subject matter expert on agency policies, practices, and procedures. Then share this practical knowledge with others to help them become organizationally agile.

Leveraging Organizational Resources – Continued

12. Collaborate on key initiatives across internal and external agency boundaries to achieve organizational objectives.

Books

- A Passion for Excellence – Tom Peters
- Seven Habits of Highly Effective People – Stephen Covey

Developmental Relationships

- Ask a colleague where information and/or resources can be obtained from the various levels within the organization.
- Ask your manager/supervisor to help with developing an action plan to help with accomplishing organizational goals.
- Talk with a manager, supervisor, or colleague on what is needed to become a subject matter expert on agency policies, practices, & procedures.

Instructor-Led Training Resources

- DAS Learning Resources
- John Glenn School – MAPS courses
- OHFA Employee Development Workshops

Making Effective Decisions – Development Guide

Tips for Developmental Experiences

1. Effective decisions will often include the following:
    a. Sound information
    b. Accurate analysis of that information
    c. Perspective from varying viewpoints
    d. Weighing the perspectives and factoring pros and cons
    e. A conclusion within a useful timeframe

    Some situations may not offer the luxury of complete information or adequate time. Effective decisions will make the best use of the pieces you do have and attempt to factor in what you may not have at this time

2. As you begin the journey of developing this competency, begin to look at how your personality traits help or hinder you when you attempt to make effective decisions; participating in personality assessments (e.g., DISC Profile or Myers-Briggs Type Indicator) may be very helpful.

3. All of us are required to make frequent decisions during our work day; some are relatively minor and easy to make and some are complex with corresponding serious consequences. The end result of making an effective decision is whether the decision produced the desired results or outcomes. It is important that the results or outcomes can be measured objectively. Please cross-reference the following competencies for further insight: Acting Decisively, Solving Problems, and Directing & Measuring Work.

4. Effective decision makers use extraordinary judgment and logic throughout the decision making process. They are extremely curious and continually as: who, what, when, where, and why; they leave no stone unturned and typically are not satisfied with just one solution but will explore various possible solutions.

5. Individuals who are effective decision makers welcome input from others (at various levels in the organization) but they will carefully evaluate the reliability of not only the source of the information, but also, the reliability of the information itself. Input will be sought from those closest to the problem, from those where buy-in is crucial, and from stakeholders. The "pros" and "cons" will be thoroughly explored as well as the possible consequences of the decision.

Making Effective Decisions - Continued

6. Effective decision makers have a "strategic mindset." They possess an uncanny ability to not only see into the future and distinguish wide-ranging implications, but also, to cultivate the vision and purpose of the organization. Business insight is a hallmark attribute for effective decision makers

Books

- Smart Choices: A Practical Guide to Making Better Decisions – John Hammond
- Why Decisions Fail: Avoiding the Blunders and Traps that Lead to Debacles – Paul C. Nutt
- How to Get Your Point Across in 30 Seconds or Less – Milo Frank
- The Female Advantage: Women's Ways of Leadership – Sally Helgesen
- The 2000 Percent Solution: Free Your Organization from "Stalled" Thinking to Achieve Exponential Success – Donald Mitchell

Developmental Relationships

- Meet with your supervisor to discuss developmental options; doing an honest self-assessment is foundational. Ask for feedback on your decision-making abilities by participating in a 360 degree feedback process
- Shadow a trusted colleague who exemplifies this competency.
- Meet with your supervisor to explore the possibility of participating in the DISC Profile or Myers-Briggs Type Indicator.

Instructor-Led Training Resources

- DAS Learning Resources
- John Glenn School – MAPS courses
- OHFA Employee Development Workshops

Managing Priorities – Development Guide

1. Be clear about your goals and objectives. Link your activities to the strategic plan to determine mission-critical activities and tasks.
2. Use goals and objectives to separate tasks or activities into the following categories:
   a. Mission critical, important, nice if there is time, and not critical to the mission.
   b. When making decisions about priorities use this scale. Always choose the highest level.
3. Take time to determine goals and priorities and planning can actually save time and help meet important deadlines. When feeling overwhelmed by details at the risk of high priority responsibilities, the following approach can help to address the situation.
   a. Make a detailed list of how you spend your time.
   b. Make a second list of your primary responsibilities reflecting their importance and amount of time they should receive.
   c. Compare the two lists to assess how effectively you are focusing your time, energy, and resources to high priority tasks and responsibilities.
4. When getting pulled in too many directions, focus on a few very important mission critical tasks or activities. Ask yourself:
   a. How much do your customers benefit from what you are doing?
   b. Are the tasks I am doing contribute to my unit's role in the strategic goals and direction of the agency?
5. Many times decisions need to be made quickly. Delay as long as practical to gather critical information, think through the options, and make your best decision possible.
   a. Make the best choice or decision with the information you have; otherwise, you will be paralyzed and not move forward. Delaying inappropriately can make decisions down the road more difficult and cause you to miss opportunities.
   b. Set priorities to maximize positive outcomes and minimum negative ones. Manage priorities based on: accurate analysis of information or data, solid grasp of organizational priorities, careful consideration of people's input and concerns, and careful reflection on the pros and cons of the alternatives.
   c. Decisions should be based on priorities rather than emotions, what you enjoy doing, or impulsiveness.
   d. Delay decisions as long as practical to gather information and weigh options.

  e. If a situation is emotionally charged, wait a few hours or overnight to decide a course of action.

  f. If you desire a quick action, resist the temptation to "jump to a decision" and weigh import factors and input to create a plan of action.

6. Conduct meetings to effectively use time, energy, and resources.

  a. Plan an agenda that states the purpose, times and outcomes for topics.

  b. Establish the order of agenda and time allotted to each topic based on importance or priority.

  c. Invite those who need information or need to be included in the decision making.

  d. Send the agenda out early enough so participants can prepare.

  e. At the end of the meeting determine next steps.

Books

- The Seven Habits of Highly Effective People – Stephen Covey
- The Answer to How is Yes: Acting on What Matters – Peter Block
- Managing Workplace Chaos: Workplace Solutions for Managing Information, Paper, Time, & Stress – Patricia Hutchings
- The Time Trap: The New Version of the Classic Book on Time Management – Alec Mackenzie
- The One Minute Manager Meets the Monkey – Kenneth Blanchard

Developmental Relationships

- Talk with your supervisor to get direction regarding priorities and tasks or assignments that are most critical. Discuss how you can work more effectively to use time, energy, and resources.
- Watch for ideas and talk with your coworkers to see how things can be done differently, such as possibly process improvements.
- Discuss with coworkers ways or approaches to evaluate priorities and stay focused during peak workloads.

Instructor-Led Training Resources

- DAS Learning Resources
- John Glenn School – MAPS courses
- OHFA Employee Development Workshops

Planning & Organizing – Development Guide

Tips for Developmental Experiences

1. When you plan and organize, a certain amount of data gathering is required. It is essential to get the details but it should not become an "end in itself." Set boundaries for yourself in terms of how much time you will allot for data gathering. Seek out the most efficient methods when compiling data. Good planning requires acquiring good data.

2. Effective planning and organizing require focused reflection, commitment, and great effort. It is important to build time into your schedule to plan on a short-term and on a long-term basis. Make sure your short and long-term goals correlate and are linked to the agency's purpose, strategies, and values. Additionally, your goals should align with the goals of your bureau, section, and work unit. Develop S.M.A.R.T. goals: Specific, Measurable, Agreed to, Realistic, and Time bound. Note: What gets measured gets done!

3. Planning and organizing your work week has huge benefits such as reducing stress and increasing productivity. It is recommended that you plan your work week on Friday afternoon while your work tasks are still etched on your mind; put it all down on paper. Once you have planned your work week, begin to determine daily tasks required to accomplish your weekly plan. It is crucial to prioritize not only your weekly work plan, but also, your daily "to-do" list. Decide what is "very important" and what is "unimportant." Note: The outcome is always "results" not just rigidly adhering to your plan.

4. In an era where everything, at times, seems to be "urgent" and "important" simultaneously, and where much more is expected from us, how can we separate the two and reduce stress in our work lives? How do we "wear all the hats" that we are asked to wear? Effective time-management skills will reduce this stressor. Pay attention to your priorities before jumping at every task. Great frustration results from pursuing what you perceive as being "urgent" sacrificing what is and should be "important." Take time to reflect and put it on paper.

Planning & Organizing – Continued

Books

- Getting Organized: Improving Focus, Organization, and Productivity – Chris Crouch
- Organize Your Work Day in No Time – K.J. McCorry
- The 25 Best Time Management Tools & Techniques: How to Get More Done Without Driving Yourself Crazy – Pamela Dodd
- Time Management from the Inside Out, second edition: The Foolproof System for Taking Control of Your Schedule – and Your Life – Julie Morgenstern
- Time Management is an Oxymoron – Maynard Rolston
- Time Management for Dummies – Jeffrey J. Mayer
- Organizing from the Inside Out – Julie Morgenstern
- The Art of Public Speaking – Stephen E. Lucas
- The Time Trap: The New Version of the Classic Book on Time Management – Alec Mackenzie
- Time Efficiency Makeover – Dorothy K. Breininger

Developmental Relationships

- Discuss with coworkers their most effective planning & organizing strategies.

Instructor-Led Training Resources

- DAS Learning Resources
- John Glenn School – MAPS courses
- OHFA Employee Development Workshops

Solving Problems – Development Guide

Tips for Developmental Experiences

1. Think of a peer/colleague or manager who you believe is an effective problem solver. Ask them how they solve problems effectively and if they adhere to a process. Ask for feedback on how they view your problem-solving abilities. Ask if they would be willing to work with you in a "mentoring" relationship.
2. Think of the last time you were faced with solving a problem either work-related or non-work related; do a self-assessment of sorts.
   a. What were some of the obstacles or constraints?
      i. Did you allow your emotions to get in the way? What kept you from solving the problem?
      ii. Did you have sufficient resources and tools?
   b. Is "time management" the reason or cause?
      i. Are you getting bogged down with too much detail?
3. Try to determine your deficiencies. Write down your thoughts and impressions.
4. If your tendency is to try to solve major problems on your own, think about involving others the next time you are faced with a major problem. This is especially important if others have a "vested" interest in how the problem is solved. This will create ownership, buy-in, and shared responsibility with all parties.
5. A team approach to problem solving is not desirable when the decision involves simple tasks or when a decision needs to be made quickly. A group process to problem solving should lead to more creative results. There is normally more than one solution to a problem.
6. Begin to develop a sound, problem-solving process that you are comfortable with. Successful problem solvers develop a systematic approach. Write down your process and adapt as needed. Get feedback on your process as you use it. There is a tendency to try to "treat the symptom but not the problem" with problem solving; symptoms tend to return.
7. Asking yourself (and others) the right questions is of great value. For example, ask:
   a. What are the symptoms of the problem?
   b. What are the causes of the problem?
   c. What could have prevented the problem?
   d. What action could have prevented the problem?
   e. Who should have taken preventative action?
   f. How can we prevent this problem from happening again?
8. Be realistic and understand that all organizations are "political" in varying degrees. It is a mistake to attempt to eradicate "organizational politics" as an end in itself.

Solving Problems – Continued

This approach could alienate you from managers and colleagues. Instead, learn to maneuver within the system effectively by getting advice from a trusted, political savvy colleague or manager.

Books

- The Art & Craft of Problem Solving – Paul Zeitz
- Becoming a Problem Solving Genius – Edward Zaccoro
- Solving Tough Problems: An Open Way of Talking, Listening, & Creating New Realities – Adam Kahane
- Strategies for Creative Problem Solving – H. Scott Fogler
- Organizing from the Inside Out – Julie Morgenstern
- Office Superman: Making Yourself Indispensable in the Workplace – Alan Axelrod
- The Manager's Problem Solver – Fred Jandt
- Supervision: A Skill Building Approach – Robert Lussier

Developmental Relationships

- Meet with your supervisor or manager to discuss developmental options. Ask for feedback on your problem solving ability.
- Shadow a trusted colleague who exemplifies this competency.
- Volunteer to participate on work teams; observe and learn from team members.

Instructor-Led Training Resources

- DAS Learning Resources
- John Glenn School – MAPS courses
- OHFA Employee Development Workshops

Thinking Strategically – Development Guide

Tips for Developmental Experiences

The goal or outcome of "thinking strategically" is achieving superior business results. You may be perceived as not putting a high priority on getting results because of the nature of your job, style differences between yourself and others, or not clearly focusing on results. To be seen as putting a high priority on attaining results:

1. Immerse yourself in learning new aspects of the business. It is an excellent way to figure out some of the more complex business within your office. Immersion is important because it requires you to research and absorb new information in order to build powerful mental models.
2. Begin to work closely or show interest in someone who is considered a master strategic thinker. This shows that you want to learn to be a strategic thinker by working with a person with strong strategic thinking skills in an apprenticeship-type relationship.
3. Make sure that you clearly understand the agency's strategic purpose and the role you play in supporting the strategic /mission of the agency. Know the business organization and what you should be aligned to.
4. Identify opportunities to improve your strategic thinking which means developing the habit of looking for opportunities to contribute to strategic discussions among colleagues.
5. Be ready to think outside the box and take acceptable risks. Move outside of your comfort zone in your thinking.
6. Be current on the environment in which you operate. Read the OHFA News Clips that are emailed daily. Also, read The Columbus Dispatch daily focusing on the front pages of both National/International news and the Metro/State sections. Look for information that might impact the Agency. Discuss key articles with your staff.
7. Let your staff know that you are interested in best practices. Encourage them to look for initiatives that others do that might apply to your work. Challenge them to be prepared to discuss one or two practices of another state agency (or another state) with a similar mandate to your agency/office. Use time in staff meetings to discuss applications.
8. Ask your staff to share their ideas in the context of how it relates to a strategic goal of the Agency or to a goal of your office.

Thinking Strategically – Continued

Books

- Strategic Thinking: A Four Piece Puzzle – Bill Birnaum
- Creating & Implementing Your Strategic Plan: A Workbook for Public & Non-Profit Organizations – John M. Bryson
- Essential Managers: Strategic Thinking – Bruce, Andy, & Ken Langdon
- Becoming a Strategic Leader – Richard Hughes
- The Strategy-Focused Organization: How Balanced Scorecard Companies Thrive in the New Business Environment – R.S. Kaplan
- The New Strategic Thinking: Pure & Simple – Michel Robert
- How to get Your Point Across in 30 Seconds or Less – Milo Frank
- Creating Public Value: Strategic Management in Government – Mark Moore

Developmental Relationships

- Approach a colleague who displays this competency and invite him or her to lunch.
- Let them know that you are looking to strengthen your strategic thinking and ask for feedback and approaches they use.
- Practice discussing strategy formulation with colleagues. Then, discuss with your supervisor and request their feedback in order to learn a strategic process, develop competence, and increase your level of confidence.
- Ask your manager for a role in your organization's planning processes (or similar process).

Instructor-Led Training Resources

- DAS Learning Resources
- John Glenn School – MAPS courses
- OHFA Employee Development Workshops

Technological Knowledge – Development Guide

<u>Tips for Developmental Experiences</u>

1. Find an experienced person in technology and ask the person to show you how to effectively use the technology. Ask, "How do you know what is important? What do you look for first? What are the five keys you always consider? What do you read? Who is your "go to" person for advice?"
2. Join a professional organization where you can get fresh ideas regarding how to apply or leverage technology.
3. Find some good reference materials to get ideas and application techniques. Ask others for materials they use or they consider their "bible" for the particular technology.
4. Ask others in your function/technology which skills and what knowledge is mission-critical and ask them how they learned the technology and applications.
5. Take a course in our training department, local community college, tech school, or university.
6. Volunteer to work with someone on a project that uses a technology in which you wish to increase your expertise.
7. Schedule time to browse on the internet to find new ideas and applications that are related to your job.
8. Use technology for practical purpose and not for the sake of using technology. Make sure its use has a clear objective.
9. Communicate information and ideas (e.g., emails, documents, specific application) effectively using a variety of media and formats.
10. Work in collaboration with co-workers, colleagues, support staff (Office of Information Services) to gain learning experience to accomplish job requirements.

Technological Knowledge – Continued

Books

- Benefits of Email and the Internet: Using the Internet to Work More Effectively
- How to Use Technology to Work More Effectively – Chirantan Basu
- Tips for Using Electronic Communication in the Workplace – Bridget Gore

Instructor-Led Training Resources

- DAS Learning Resources
- John Glenn School – MAPS courses
- OHFA Employee Development Workshops

Results Orientation – Development Guide

Tips for Developmental Experiences

- Explain and show your employees how their efforts contribute to the bottom line and to organizational success. Discuss organizational results and what you and your team are or can be doing to impact those results.

- Keep others informed about what you and your team are doing.

- List the long-term goals of the work unit. Establish short-term goals that will help to achieve the long-term goals. Monitor the achievement of both short and long-term goals.

- Make sure that your goals are clearly aligned with your organization's strategic goals and business requirements.

- Make sure you and your teams have measurable goals and objectives. Then focus on results, not activity.

- Recognize that you need quality processes to attain quality results.

- Refrain from saying it can't be done. Instead focus on how you can make it happen.

- The priority you place on people, accuracy, quality, etc. may be seen as not putting a priority on getting results. Ask for feedback about this. Ensure that all your priorities are compatible with achieving strong results.

- Take responsibility for results. Adopt a "results" mind-set rather than an "activity" mindset. Ask yourself, "Will what I'm doing now lead to the results I want, or am I just staying busy?"

- Translate broad, longer-term goals into specific milestones. Then manage to these milestones.

- With your team, develop a set of criteria for effective performance. Include necessary accomplishments and make sure your reward system is aligned with the results you want to achieve.

Books

- Eat that Frog! 21 Great Ways to Stop Procrastinating and Get More Done in Less Time by Brian Tracy
- Execution: The Discipline of Getting Things Done by Larry Bossidy
- Getting Results: Five Absolutes for Getting Performance by Clinton O. Longenecker
- Good to Great: Why Some Companies Make the Leap and Others Don't by Jim Collins

Results Orientation – Continued

Instructor-Led Training Resources

- DAS Learning Resources
- John Glenn School – MAPS courses
- OHFA Employee Development Workshops

Leadership – Development Guide

Tips for Developmental Experiences

- Actively coach individuals and teams to strengthen their performance.
- Ask employees what you can do to improve the way you delegate tasks. Listen to their suggestions and integrate them into your style of delegation.
- Ask your team members to set their own milestone dates and then hold to these dates, except on rare occasions when slippage is clearly justified.
- Coach someone on how to do something with which he/she has little familiarity.
- Complete performance appraisals. Highlight and emphasize areas for positive feedback and recognize contributions individually. Have a two-way discussion on ideas for improvement.
- Conduct monthly one-on-one meetings with each direct report to assess progress toward performance plan, and to solicit feedback.
- Connect people with role models and mentors who possess the skills they are trying to develop.
- Delegate one responsibility you have never been comfortable delegating before. Whether large or small, stretch your comfort level. But be sure to limit the risk and monitor the process not the results. Notice your own reactions. Remember, it is a learning experience for you as well!
- Design your staff meetings so you are not the sole source of information. Ask other people to give updates and share relevant information.

- Adapt what's already there. You don't have to innovate from scratch. Some of the most successful ideas build on other concepts.
- Attend seminars and lectures outside of the organization. Participate in external forums that discuss current government issues and future trends. Think about how this information impacts your work.
- Be able to summarize the short and long-term consequences of failing to implement a new initiative.
- Be alert for when you hold on to a solution or procedure because "that's the way it's always been done," instead of considering other alternatives.
- Benchmark similar agencies in other states for ideas to improve the efficiency or the quality of work/service provided by the State.
- Build in the expectation of continuous improvement. Ask employees about improvements they have identified. Set the clear expectation that spotting opportunities is part of their job.
- Celebrate and communicate successes – even small ones!

Leadership – Continued

- Challenge your employees to find ways of improving business and work processes. Use various forums (staff meetings, private conversations, performance plans) to stimulate and reinforce the need to make continuous improvements.

- Clearly set improvement expectations for your employees. Focus on improvements in terms of cost and efficiency, but also innovation.

Books

- Managing Change and Transition by Richard Luecke
- Managing Creativity and Innovation, Harvard Business School Essentials
- Our Iceberg is Melting: Changing and Succeeding Under Any Conditions by John Kotter
- Busy Manager's Guide to Delegation by Richard A. Luecke
- Developing the Leaders Around You by John C. Maxwell
- First Break All the Rules: What the World's Greatest Managers Do Differently by Marcus Buckingham
- If You Want It Done Right, You Don't Have to Do It Yourself: The Power of Effective Delegation by Donna M. Genett
- Manager's Guide to Effective Coaching by Marshall J. Cook
- One Page Talent Management: Eliminating Complexity, Adding Value by Marc Effron
- The Carrot Principle: How the Best Managers Use Recognition to Engage Their People, Retain Talent, and Accelerate Performance by Adrian Gostick
- The Talent Masters: Why Smart Leaders Put People Before Numbers by Bill Conaty

Instructor-Led Training Resources

- DAS Learning Resources
- John Glenn School – MAPS courses
- OHFA Employee Development Workshops

Effective Communication – Development Guide

<u>Tips for Developmental Experiences</u>

- Allow important e-mails and other written communication to sit before sending them out. Draft the communication, then come back several hours later and review it again. You will be better able to "see" your message and any errors more clearly.

- As you read, look up words in the dictionary that are unfamiliar to you and use them regularly.

- Ask a colleague or manager to observe and critique your listening skills when you interact with others. Work on problem areas.

- Ask your employees what information they would like to receive regularly from you, and then tell them what you'd like to hear from them.

- Before making a formal presentation, practice in front of peers. Solicit feedback and incorporate into the presentation.

- Carefully watch recognized speakers on television, radio, etc. Incorporate a few of those skills into your presentations.

- Create and deliver a visual presentation that communicates the vision for the team, division, or agency.

- Critique speakers, team leaders, and managers to better understand the criteria for effective communication.

- Each time you have a conversation with someone, log the number of times you stopped yourself from interrupting others to let them complete their thoughts.

- Facilitate a focus group session.

- Identify situations in which you have the most difficulty being a good listener and devise a strategy to prepare for them in advance.

- Identify someone in your agency who is a great presenter or communicator. Ask the person to work with you to develop your communications skills.

- Identify someone who is a good listener and observe what she or he does. Seek advice on how to improve your listening skills.

- Join your local Toastmasters Chapter. http://www.toastmasters.org/

- Keep a log of situations where you made an attempt to listen effectively. List the situation, what you did well and what you need to work on.

- Lead a team meeting.

- Learn three new vocabulary words a week and use them regularly.

- Listen to books on audiotape. Write a summary of the book or discuss the main ideas with others.
- Over the next two or three weeks, pay close attention to the non-verbal cues of others when communicating with them. Determine what emotions are being communicated and check your assessment with the individual before acting on them. Assess your progress in understanding others.

Books

- Active Listening by Michael H. Hoppe
- Are You Really Listening?: Keys to Successful Communication by Paul J. Donoghue
- *Business Communication, Harvard Business Essentials*
- *Can-Do Writing: The Proven Ten-step System for Fast and Effective Business Writing* by Daniel Graham,
- Difficult Conversations: How to Discuss What Matters Most by Douglas Stone
- Effective Business Writing by Patrick Forsyth
- Get to the Point! Painless Advice for Writing Memos, Letters and Emails Your Colleagues and Clients Will Understand, Second Edition by Elizabeth Danziger
- Presenting to Win, The Art of Telling Your Story by J. Weissman

Instructor-Led Training Resources

- DAS Learning Resources
- John Glenn School – MAPS courses
- OHFA Employee Development Workshops

External Training
Universities Offering Free Writing Courses Online

Whether you are currently writing professionally or are looking to break into the field, formal writing courses can help you hone your skills. If you don't have the money or the time for campus-based courses, there are plenty of universities offering free writing courses online.

1. Massachusetts Institute of Technology (http://ocw.mit.edu/index.htm)

MIT offers dozens of free undergraduate and graduate writing courses online through its MIT OpenCourseWare initiative. Course topics include everything from writing fiction, poems and essays to analyzing all forms of literature. Lecture notes, videos, suggested reading lists and more will help you to become the writer you've always wanted to be. No registration is required.

2. Utah State University (http://ocw.usu.edu/)

Utah State University's Department of English publishes three free courses devoted to the art of writing through the school's OpenCourseWare program. The courses are extensive and may take up to 16 weeks to complete if you study at the average pace. No registration is required. Courses are similar to the courses that might be found in a professional writing degree program.

3. Open University (http://labspace.open.ac.uk/)

The UK's largest academic institution, Open University, offers a number of different writing courses through their OpenLearn website. The free curriculum includes both undergraduate and graduate level writing courses that are available to everyone regardless of country of origin. No registration is required.

4. University of Utah (http://www.hum.utah.edu/english/)

The University of Utah's English Department offers free courses to self-learners around the world. Currently, there are only two free writing courses. Both offer strong preparation in their topic and are built for beginners. No registration is required.

4. Western Governors University (http://www.wgu.edu/)

Western Governors University has made free course materials available through an open content license. There are several free writing courses courtesy of the university's Liberal Arts Department. All courses are split into convenient self-study modules. No registration is required.

6. Purdue University (http://owl.english.purdue.edu/)

Purdue University brought their writing lab to life online in 1994 to offer a writing resource to students no matter where they were located. Online Writing Lab (OWL) materials are now free to everyone regardless of location or student status. The OWL site offers writing instruction, grammar and usage information, individualized help from tutors and much more. No registration is required.

7. Steven Barnes' UCLA Writing Course (http://www.lifewrite.com/html/class.htm)

Best-selling author and screenwriter Steven Barnes offers a free version on his website of the writing class he has been teaching for many years at UCLA. The course offers in-depth instruction on writing, which is why Barnes suggests completing each part of the nine-week course one week at a time. Nevertheless, the course can be downloaded all at once. No registration is required.

Cross-Cultural Intelligence – Development Guide

<u>Tips for Developmental Experiences</u>

- Actively solicit input from a wide variety of people and functions.
- Circulate newsletters and articles talking about diversity in the workplace.
- Create a diversity newsletter for your organization. Involve others to help it expand.
- Create learning opportunities about diverse cultures during team meetings (e.g., have a 'diversity' potluck for lunch or play a diversity trivia game).
- Create or volunteer to participate on a panel that reviews organizational policies and practices for inclusiveness.
- Create or volunteer to serve on a diversity council.
- Educate yourself about your own cultural values, assumptions, and background.
- Make a point of drawing together diverse groups when discussing issues, solving problems and developing opportunities.
- Research diversity topics (e.g. TV specials, articles, blogs, theater). Engage colleagues in discussions about diversity.
- Seek to have a mentor/mentee from a different background.
- Speak out when others are not valued or their ideas or views are not taken into account.
- Spend time (e.g., lunch, breaks) with people who are from a different background.
- Suggest diversity issues and topics for the agenda at regular management or work team meetings.
- Survey or conduct a focus group to gain insight regarding ways to make the work environment more inclusive.
- Use personality tools like the DiSC Profile to learn ways of understanding individual differences among people.
- Volunteer to do an internal diversity analysis of your workplace. Share your findings with others.

Cross-Cultural Intelligence – Continued

Books

- Bridging Differences: Effective Intergroup Communication by William B. Gudykunst
- Generations, Inc.: From Boomers to Linksters - Managing the Friction Between Generations at Work by Meagan Johnson
- None of Us Is As Good As All of Us: How McDonald's Prospers by Embracing Inclusion and Diversity by Patricia Sowell Harris
- Salsa, Soul, and Spirit: Leadership for a Multicultural Age by Juana Borda
- The Loudest Duck: Moving Beyond Diversity while Embracing Differences to Achieve Success at Work by Laura A. Liswood
- What If?: Short Stories to Spark Diversity Dialogue by Steve L. Robbins

Instructor-Led Training Resources

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Analytical/Critical Thinking – Development Guide

Tips for Developmental Experiences

- Ask for feedback from your manager, colleagues, and/or employees regarding your decision-making skills. Devise a plan to work on problem areas.

- Ask your manager to increase the scope of your decision-making authority. This will enable you to learn more about other areas of the business.

- Become a certified mediator.

- Consider at least two alternatives for solving a problem.

- Develop a short list of 'values' with your department or unit to guide decision-making and interpersonal behavior. Get your team involved in making the list. Review the list at meetings.

- Get ideas and suggestions about the root cause of the problem from someone who is successful at solving similar problems or from someone who will be impacted by the problem.

- Get into the habit of identifying and challenging the assumptions and beliefs that underlie your thinking, conclusions, and decisions.

- Identify a problem that could not be resolved. Take some time to reconsider the issue. Write down solutions that could have been used to solve the problem and use them in similar situations.

- Identify someone who is successful at solving problems and ask if there is a problem that you can think through with her or him to enhance your problem solving skills. Discuss the problem with the person. Look for casual relationships. Develop a response to the problem, then compare your response to the other person's response. Discuss similarities and differences in your responses.

- In an effort to identify the root cause of the problem, try to examine the problem from another perspective. For example, how would the manager or a colleague with excellent problem solving skills handle the problem?

- Look for a significant problem in the department. Examine the background of the problem. Have similar problems been encountered in the past? If necessary, break down the problem into pieces. Determine the factors that must be addressed and develop a plan to address the issue. Think through why the plan will be successful. Evaluate and modify the plan as appropriate.

- Make a SWOT (strengths, weaknesses, opportunities, threats) analysis when facing a dilemma to make the proper decision.

- Over a two or three week period, keep a journal of all of the major decisions you made and how long it took to make each decision. Analyze journal entries to gain

insight into any obstacles that may have impeded decision-making. Work to overcome obstacles. Monitor progress in this area.

Critical Thinking – Continued

Books

- Asking the Right Questions: A Guide to Critical Thinking by Neil Browne
- Blink: The Power of Thinking without Thinking by Malcolm Gladwell
- businessThink: Rules for Getting it Right – Now, and No Matter What! by Dave Marcum
- Step-by- Step Problem Solving: A Practical Guide to Ensure Problems Get (and Stay) Solved by Richard Chang
- Think Again: Why Good Leaders Make Bad Decisions and How to Keep It From Happening to You by Sydney Finkelstein

Instructor-Led Training Resources

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- John Glenn School – MAPS courses
- OHFA Employee Development Workshops