

# *City of Coral Gables* Community Recreation Leadership Succession Plan



*A World-Class City  
With A Home-Town Feel*

**CORAL  
GABLES**  
THE CITY BEAUTIFUL



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### **Mission Statement**

*To enrich the quality of life for residents and guests through inclusive recreational opportunities, facilities, services, and events that create memorable life experiences.*

### **Vision Statement**

*Enhancing your lifestyle by making leisure our passion.*

### **Values**

*Leadership through dedication and passion  
Enjoyment & fun  
Integrity  
Safety  
United family  
Recreation for all  
Environmentally conscious*

**It Starts  
in Parks**



*The City Beautiful*™

## **City of Coral Gables**

### **Mission Statement**

*To honor our history by providing exceptional services that enhance the quality of life for our community.*

### **Vision Statement**

*A world-class City with a hometown feel.*

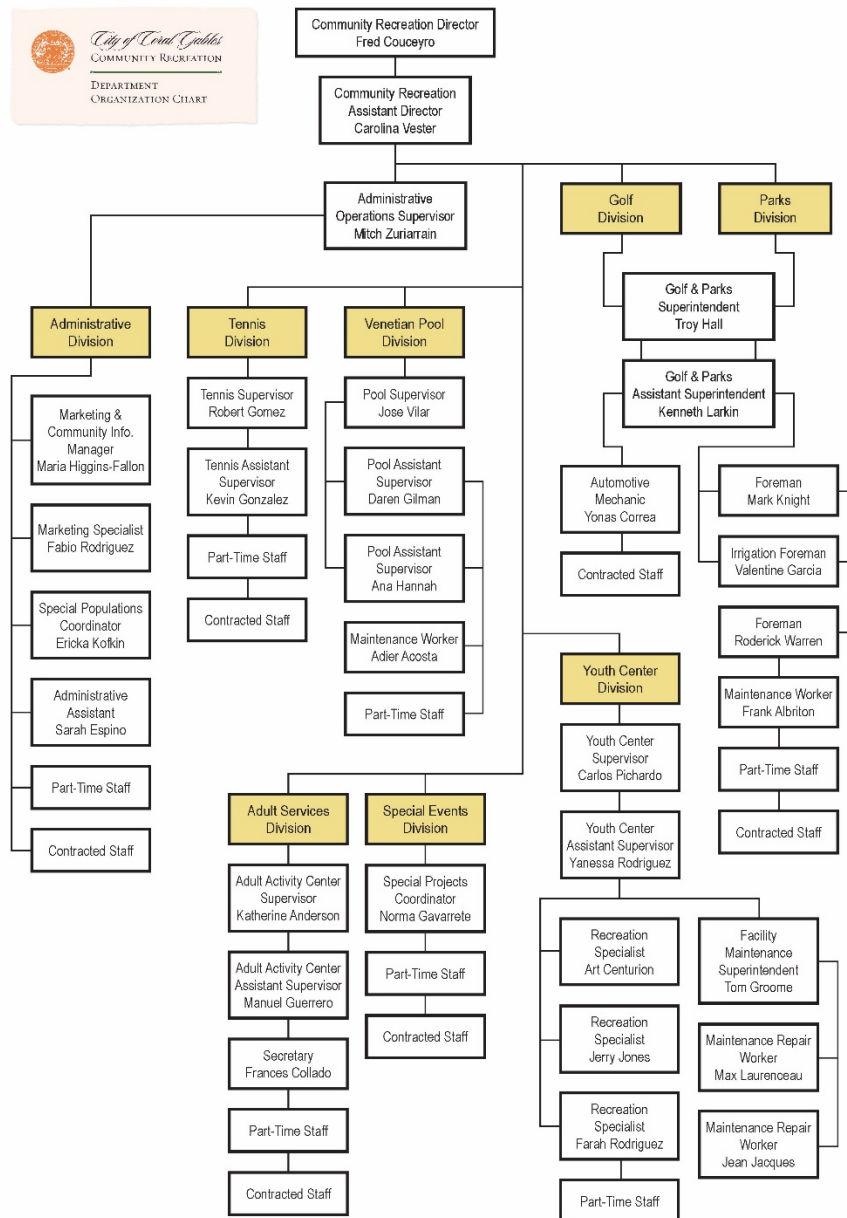
### **Values**

*Governance with integrity  
Aesthetics  
Balanced  
Learning  
Exceptional service  
Sustainability*

## Introduction

The Community Recreation Department manages, maintains and operates a combination of 62 parks and recreation facilities that fall under the purview of eight critical divisions. The purpose of this plan is to provide the policies and tools to effectively plan for both short-term and long-term vacancies in the Department's Leadership for its essential & critical divisions. The plan also assists with identifying, developing, retaining and training employees to fill leadership roles as they become available. In an effort to provide an effective long term succession plan, the Department focuses on a combination of strategies that include recruiting superior employees; developing their skills, abilities and knowledge; and preparing them for promotion or advancement.

The Department consist of the following essential divisions within its organizational structure: Administration, Adults, Youth, Tennis, Aquatics, Special Events, Golf & Parks.



## I. Leadership Succession Policy

The purpose of the Leadership Succession Policy is to expand on the broader human resources planning process, which is limited to recruitment and promotion as it pertains to vacant positions. The benefits of a succession plan include continuity of operations as well as a mechanism to retain and develop the Departments best employees. A successful succession plan will demonstrate that there is growth and an opportunity to advance within the Department and organization.

The primary objective of the Department's succession plan is to train and promote employees within the organization when possible. However, in filling a vacancy, whether through internal promotion or an external new hire, the goal is to fill the position with a candidate with the proper skill set and experience to ensure success.

A change in critical leadership is inevitable for all organizations and can be very challenging. Therefore, it is the policy of the Department to be prepared for any change in its critical leadership – either planned or unplanned – to ensure the stability and accountability of the Department.

To ensure that the divisions operations are not interrupted while the Department assesses the leadership needs and recruits a permanent replacement, the respective assistant to the position is appointed as the designee and will be compensated accordingly.

As part of the Department's succession plan, the department provides an employee development model and plan referred to as the Employee Excellence Model, which consists of setting goals, developing a plan and accessing the necessary trainings.

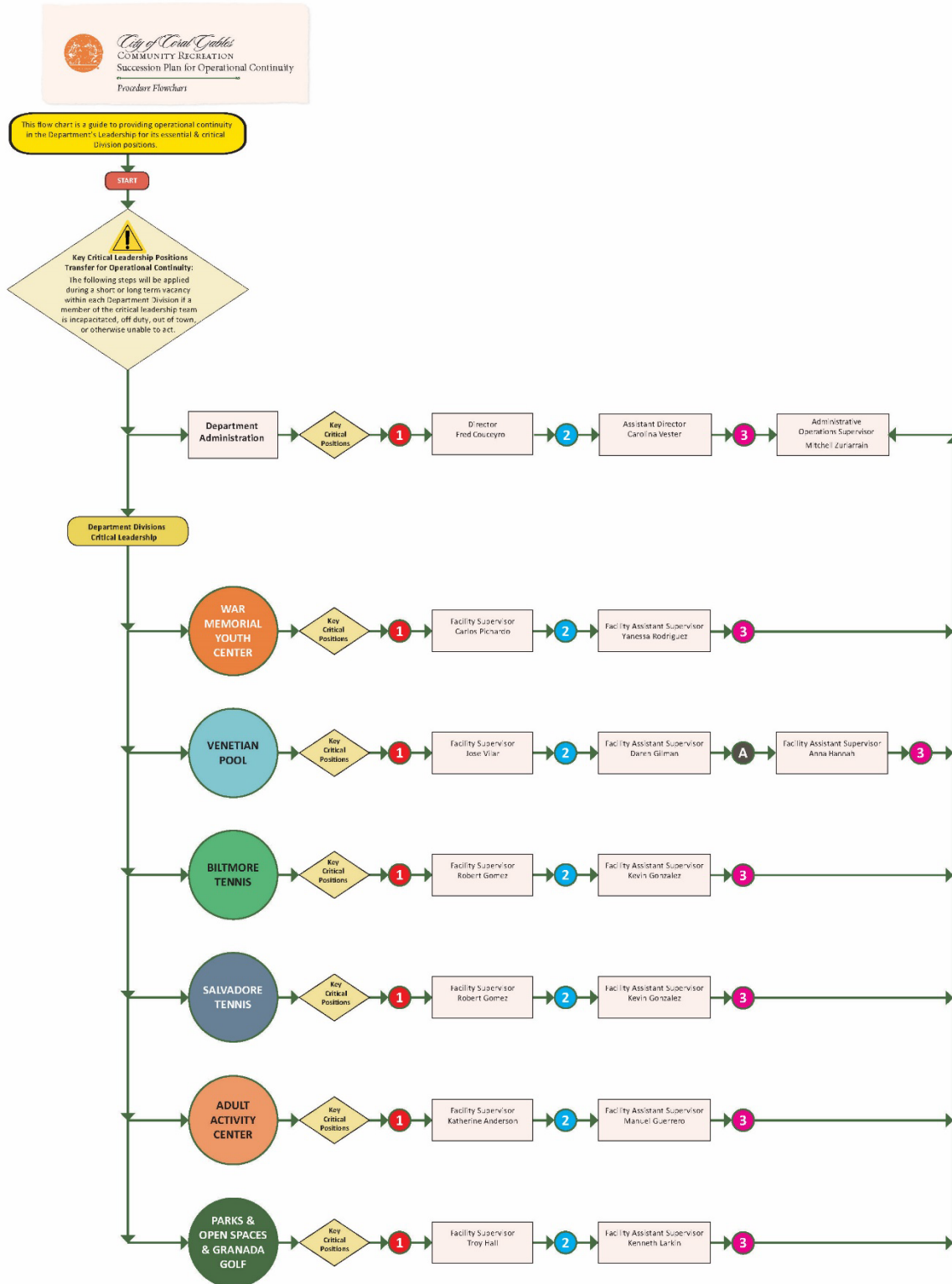
The Employee Excellence Model is a set of capabilities that describe the knowledge, skills, and abilities required by all employees to perform their roles successfully. The model defines core capabilities for all employees and leader behaviors for those in people leadership roles. The model supports job performance and encourages continuous development.

The Employee Excellence Process is a simple four step process that defines the City's approach to performance management with the Employee Excellence Model at the core. The Employee Excellence Model is aligned with the City's strategic objectives and describes the behaviors and expectations that will enable employees to meet those objectives. These behaviors apply to all employees across the organization. The four steps of the process define the conversations that leaders are expected to be conducting with their team over the course of the year. Most of these conversations last no longer than 15 minutes and can have a significant impact on the productivity and engagement of all employees.



## Short-Term Leadership Succession Plan:

In the event of a short-term absence due to vacation, illness, etc., all key critical leadership positions have a designated assistant position with the required training and certifications to fulfill the duties and act on behalf of the vacant leadership position without compromising the continuity of operations. In addition to the designated assistant position, division/facility coverage plans are developed.



## Long-Term Leadership Succession Plan:

The following steps must be implemented for a successful long-term leadership succession plan:

1. Identify key critical leadership positions.
  - a. A position is considered key or critical if:
    - i. Organizational structure - The position is a key contributor in achieving the organization's mission.
    - ii. Key task - The position performs a critical task that would stop or hinder vital functions from being performed if it were left vacant.
    - iii. Specialized leadership - The position requires specialized or unique expertise (skill sets) that is difficult to replace.
    - iv. Potential high turnover - Positions in the same division are in danger of "knowledge drain" due to retirements or high turnover.
2. Periodically review each leadership position by assessing its job description, key job functions and responsibilities.
3. Identify key criteria and requirements for each leadership position such as training and certification requirements that internal candidates may pursue to obtain the required skills to best prepare them for the leadership position if a vacancy opens up.
4. Each leadership position is to work closely with their respective designee and support team to provide them with the necessary tools and training to allow for continuity of operations during a short or long-term absence.
5. Identify internal candidates for each leadership position and evaluate the candidates' capabilities to provide them with the necessary resources to assist them in developing new skills. Tools such as the talent profile grid template may assist in identifying leadership potential based on performance.

Talent Profile Grid Template (enter in names of employees to map potential of each)				
Leadership Potential	High	Improve in current role or reassign	Lots of potential – Develop and Coach	Top talent – provide special development
	Medium - Growth Potential	Improve in current role	Meets all targets – provide training and development opportunities	Exceeds targets give "stretch" goals
	Low - Limited Potential	Bad hire/replace – underperformer	Improve in current role – "Average Joe" – happy to stay in position	Reconsider – overperformer but not ambitious
		Unacceptable	Meets	Exceeds
		Performance		

6. Develop a transition timeline for critical positions.
7. Document progress and evaluate effectiveness.
  - a. Ongoing evaluation and adjustments are vital to effective succession planning. Although the succession plan covers a 3-5 year period, it should be reviewed at least annually. If an agency does not regularly review its succession planning efforts, it runs the risk of failing to meet goals or not having the ability to rapidly respond to unanticipated changes.

## Measuring the Success of the Leadership Succession Plan:

### City of Coral Gables - Community Recreation Succession & Promotion Matrix

Staff Name:	Position at First Hire:	Promoted to:	Promoted to:	Promoted to:	Promoted to:
<b>Fred Couceyro</b>	Recreation Leader	Recreation Specialist	Assistant Director	Director	
<b>Carolina Vester</b>	Part-time Lifeguard	Venetian Pool Aide	Asst. Venetian Pool Supervisor	Venetian Pool Supervisor	Assistant Director
<b>Mitch Zuriarrain</b>	Part-time GSR	Program Assistant	Administrative Assistant	Administrative Operations Supervisor	
<b>Sarah Espino</b>	Asst. Venetian Pool Supervisor	Administrative Assistant			
<b>Fabio Rodriguez</b>	Part Time Marketing Asst.	Recreation Marketing Specialist			
<b>Ericka Kofkin</b>	Part Time Special Populations Coordinator	Full-Time Special Populations Coordinator			
<b>Norma Gavarrete</b>	Part-time Cashier	Full-Time Office Clerk	Special Projects Coordinator		
<b>Carlos Pichardo</b>	Part-time Counselor	Part-time Program Asst.	Recreation Specialist	Assistant Youth Center Supervisor	Youth Center Supervisor
<b>Yanessa Rodriguez</b>	Part-time Counselor	Part-time Program Asst.	Recreation Specialist	Assistant Youth Center Supervisor	
<b>Farah Rodriguez</b>	Part-time Counselor	Part-time Program Asst.	Recreation Specialist		
<b>Art Centurion</b>	Part-time Coach	Part-time Program Asst.	Recreation Leader	Recreation Specialist	
<b>Jerry Jones</b>	Part-time Program Asst.	Recreation Specialist			
<b>Tom Groome</b>	Maintenance Worker I	Maintenance Foreman			
<b>Jose Vilar</b>	Part-time Lifeguard	Asst. Venetian Pool Supervisor	Venetian Pool Supervisor		
<b>Darren Gilman</b>	Part-time GSR	Part-time GSR Specialist	Asst. Venetian Pool Supervisor		
<b>Robert Gomez</b>	Tennis Professional	Tennis Operations Supervisor			
<b>Kevin Gonzalez</b>	Part-time GSR	Part-time GSR Specialist	Tennis Assistant Supervisor		
<b>Katherine Anderson</b>	Assistant Youth Center Supervisor	Adult Activity Center Supervisor			



# Employee Excellence Model

Building Capability Across The Organization

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# Introduction

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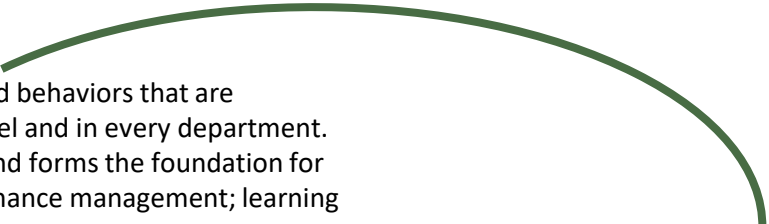
## ***About the Employee Excellence Model***

The Employee Excellence Model defines the capabilities and behaviors that are expected of all City of Coral Gables employees, at every level and in every department. The model is aligned with our Coral Gables Strategic Plan and forms the foundation for our organization development processes including: performance management; learning and development and our workforce planning processes.

This alignment forms a very powerful organization system and creates a shared language to describe the knowledge, skills and abilities needed to perform work across all of our departments. The Employee Excellence Model supports:

- ❑ our performance review process by assisting leaders and staff to have a clear, common understanding of performance expectations
- ❑ fostering a learning culture and identifies targeted employee learning and development activities, both formal and informal
- ❑ individual career planning, enabling employees to build the skills and competencies needed for future roles
- ❑ systematic workforce planning, as we can use the capabilities to identify current and future workforce capability needs and gaps

Our Employee Excellence Model enables our ability to improve performance and ensures we are driving all of our people-related activities toward the achievement of our City goals and objectives

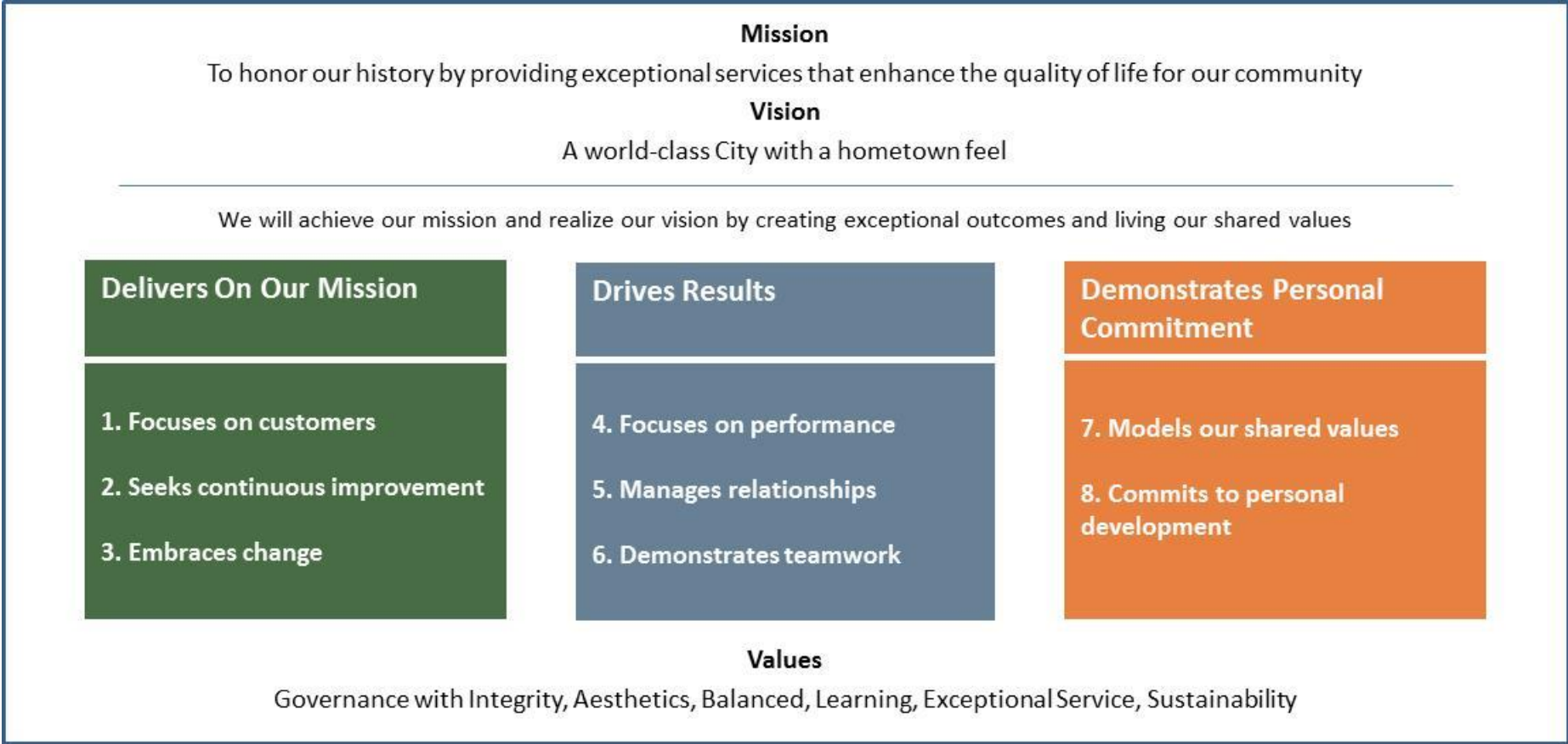


Capabilities are the knowledge, skills and abilities required by employees to perform their roles efficiently and effectively



# The Employee Excellence Model

The Employee Excellence Model describes eight capabilities organized into three core groups: Delivers on our Mission, Drives Results and Demonstrates Personal Commitment. The overall visual of the model links and aligns the key elements of our strategic plan with our performance model for individuals across the organization.



# The Groups of Capabilities

Along with the three main groups of capabilities, a fourth group recognizes role specific capabilities required by some of our positions in the organizations. The capability groups work together to provide an understanding of the knowledge, skills and abilities required by employees across our organization.

## Mission



### **Focuses on the Customer**

Actively works to satisfy the needs of customers and strives to exceed their expectations.

### **Seeks Continuous Improvement**

Willing to try new ways of working and works to improve processes.

### **Embraces Change**

Embraces change and shows resilience in times of uncertainty.

## Results



### **Focuses on Performance**

Sets clear goals and objectives and strives for superior results.

### **Manages Relationships**

Works to effectively communicate; build strong relationships and resolve conflict.

### **Demonstrates Teamwork**

Works cooperatively and productively with others to achieve results.

## Commitment



### **Models Our Shared Values**

Is a role model for our values and holds oneself and others accountable.

### **Commits to Personal Development**

Makes an active commitment to continuously grow and develop.



### **Role Specific Capabilities**

Works to effectively apply role specific knowledge, skills and behaviors.

# How to Read the Capabilities

**Capability Name and Definition**  
Name of the capability and a brief definition

**Capability Group**  
High level grouping of related capabilities

## Delivers on the Mission



### Focuses on the Customer

Actively works to satisfy the needs of customers and strives to exceed their expectations.



- Engages customers in a friendly and appropriate manner in person, on phone or electronically
- Shows respect and responds with courtesy, clarity and accuracy for all inquiries from customers and other departments
- Effectively diffuses difficult situations
- Applies sound judgment when responding to issues
- Quickly and effectively resolves customer problems



- Actively works to understand the needs of customers and stakeholders across departments
- Encourages a strong customer-focus and builds understanding of customer perspectives within their team
- Shows respect for customers and stakeholders

**Individual Contributor**  
The supporting behaviors expected to be demonstrated by individual contributors

**People Leaders**  
In addition to the Individual Contributor behaviors, these are the supporting behaviors expected to be demonstrated by those who lead other people



# Delivers on the Mission

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## Focuses on the Customer

Actively works to satisfy the needs of customers and strives to exceed their expectations.

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- Engages customers in a friendly and appropriate manner in person, on the phone or electronically
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- Actively works to understand the needs of customers and stakeholders across departments
- Encourages a strong customer focus and builds understanding of customer perspectives within their team
- Shows respect for customers and stakeholders

# Delivers on the Mission

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## Seeks Continuous Improvement

Willing to try new ways of working and works to improve processes.

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- Implements solutions that reduce future errors or mistakes
- Generates and shares creative ideas and suggestions for improvement



- Encourages creativity and innovation
- Identifies and implements improved ways of doing things
- Analyses both success and failure to identify opportunities for improvement

# Delivers on the Mission

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## Embraces Change

Embraces change and shows resilience in times of uncertainty.

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- Understands and accepts others' points of view and recognizes the value of different approaches
- Demonstrates openness to new structures, procedures and technology
- Accepts change even when there is some ambiguity



- Adopts a planned and comprehensive approach to implementing organizational change
- Understands and influences organizational culture
- Communicates the positive side of change for the team and organization
- Assists the team to adapt to a changing environment



# Drives Results

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## Focuses on Performance

Sets clear goals and objectives and strives for superior results.

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- Seeks clarity of tasks, asks questions and knows what is expected of them
- Energetically approaches challenges
- Demonstrates knowledge of department policies and procedures
- Sets priorities and organizes self to meet deadlines
- Reports progress and any potential delays or issues which may impact others
- Identifies what needs to be done and takes action before being asked



- Clearly communicates goals, priorities and vision
- Recognizes achievement of individuals and team
- Implements systems and processes to ensure ongoing effectiveness and efficiency
- Organizes various resources (people, funding, material, support) to achieve results
- Measures and monitors the performance of their area (staff performance, budget, projects)

# Drives Results

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## Manages Relationships

Works to effectively communicate; build strong relationships and resolve conflict.

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- Listens attentively to people, ideas and concerns
- Demonstrates ability to provide explanation and/or options to resolve difficult situations
- Expresses idea clearly and concisely
- Able to clearly and accurately explain issues, policies procedures and other information
- Keeps his/her manager and colleagues informed about progress and problems, avoids surprises



- Builds and maintains productive relationships with internal and external stakeholders
- Communicates in a way that is appropriate for the situation, and that promotes trust, respect and integrity
- Models open communication. Actively and attentively listens to others
- Understands different and competing views, and synthesizes stakeholder information to inform approach

# Drives Results

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## Demonstrates Teamwork

Works cooperatively and productively with others to achieve results.

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- Steps up to support co-worker's tasks when needed or required
- Respects confidentiality of information shared by others
- Contributes constructively to teamwork
- Expresses disagreement constructively
- Respects and welcomes diversity of customers and coworkers
- Promotes cooperation across departments



- Develops staff for high performance through providing appropriate guidance and support
- Understands and can articulate the strengths and limitations of their direct reports and staff
- Develops the knowledge, skills and abilities of their direct reports, and other staff within their group
- Encourages opportunities for learning and stretch assignments to build capability



# Demonstrates Personal Commitment

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## Models Our Shared Values

Is a role model for our values and holds oneself and others accountable.

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- Acts in accordance with the Coral Gables Code of Conduct
- Models ethical behavior and consistently applies those ethical standards to self and others
- Is consistent in word and actions
- Is viewed as trustworthy, honorable, truthful, and respectful of the views of others

# Demonstrates Personal Commitment

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## Commits to Personal Development

Makes an active commitment to continuously grow and develop.

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- Is aware of personal strengths and weaknesses
- Is committed to their own development and continuous self-improvement, and sees learning opportunities in everyday work
- Reflects on the reasons for both success and failure, and learns from the experience
- Actively seeks feedback and modifies their approach to enhance effectiveness

# Role Specific Capabilities

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## Role Specific Capabilities

Works to effectively apply role specific knowledge, skills and behaviors.

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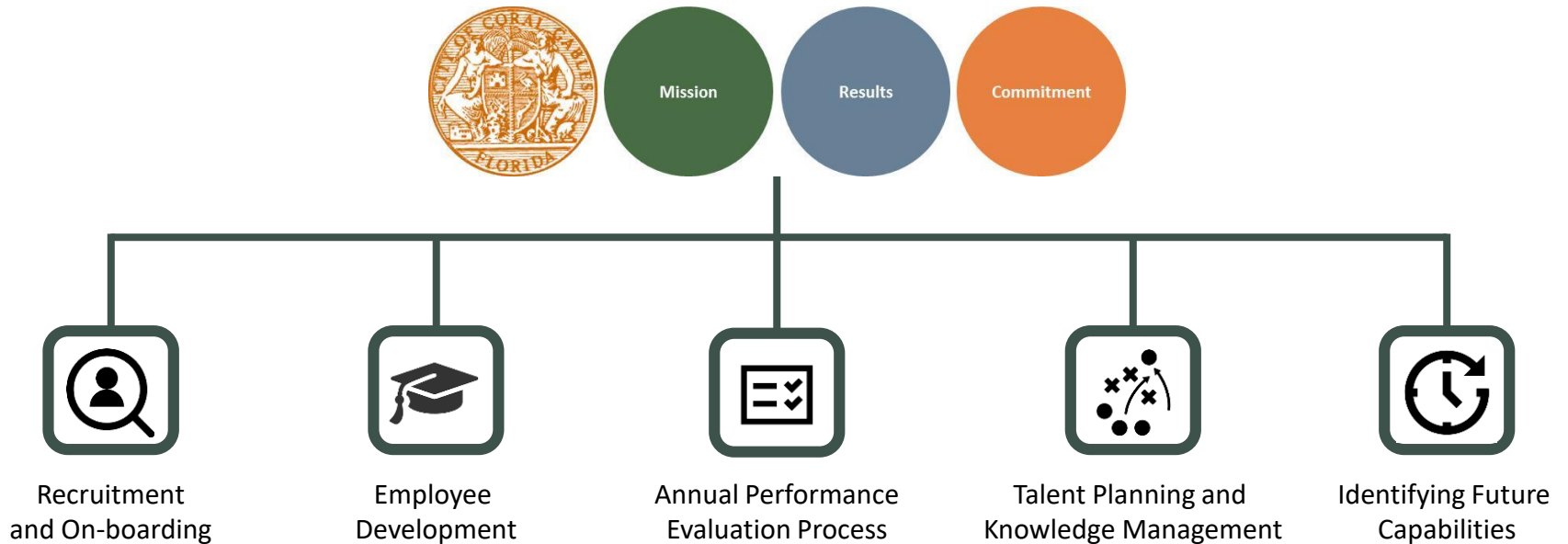
- ❑ Ability to effectively use the tools and other equipment required for the role
- ❑ Demonstrates the ability to apply the knowledge and skills necessary to effectively perform the role

In partnership with Human Resources, we will coordinate the development of role/profession-specific capabilities for jobs where professional standards or models already exist (i.e. technology roles, accounting roles, etc.). These profession-specific capabilities, together with the Employee Excellence Model will provide a holistic picture of the knowledge, skills and abilities required for each role.

# How Will We Apply the Model



The Employee Excellence Model forms the foundation for the management of our people-related processes. A single, unifying model enables alignment of our end-to-end talent management process. It creates consistency across the organization as we conduct employee conversations regarding their performance, development and growth.



# Employee Development Planning

Guide for Individual Contributors





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## Overview

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### Introduction

The City of Coral Gables is committed to the development and growth of all our employees. Focusing on learning and continuously building our capabilities will ensure we can meet and exceed the expectations of our customers today and be prepared for future opportunities and challenges.

This guide was developed to support your learning and development and is designed to provide the framework and tools for you to identify and prioritize your learning needs and enable you to achieve your career aspirations.



### What is an Employee Development Plan?

Employee development planning is a process used actively by both you and your leader to ensure you are growing professionally, developing your ability to achieve more in the workplace, and contribute to meeting the organization's goals. The employee development plan is an action plan that captures the goals, actions and measures of success for your development.

Employee development planning is an **employee-directed** activity; you are responsible for creating and implementing your own plan. Your leader plays a critical, supportive role in the process.

An effective development plan:

- **Is created and owned by you**
- Has the sincere support of your manager and the organization
- Is customized to your career interests and goals
- Is realistic and achievable
- Is something you can begin working on immediately
- Includes a variety of on-the-job activities and involvement of others
- Identifies how progress will be monitored and measured
- Is reviewed and updated on a regular basis

The responsibility for continuous learning rests with you and your personal motivation to learn. Your leader plays an important role in providing the coaching and feedback on your performance and guidance in the development of your plan.

If you have any questions or require additional support please contact Craig DeWald in the Human Resources Department (X5524).

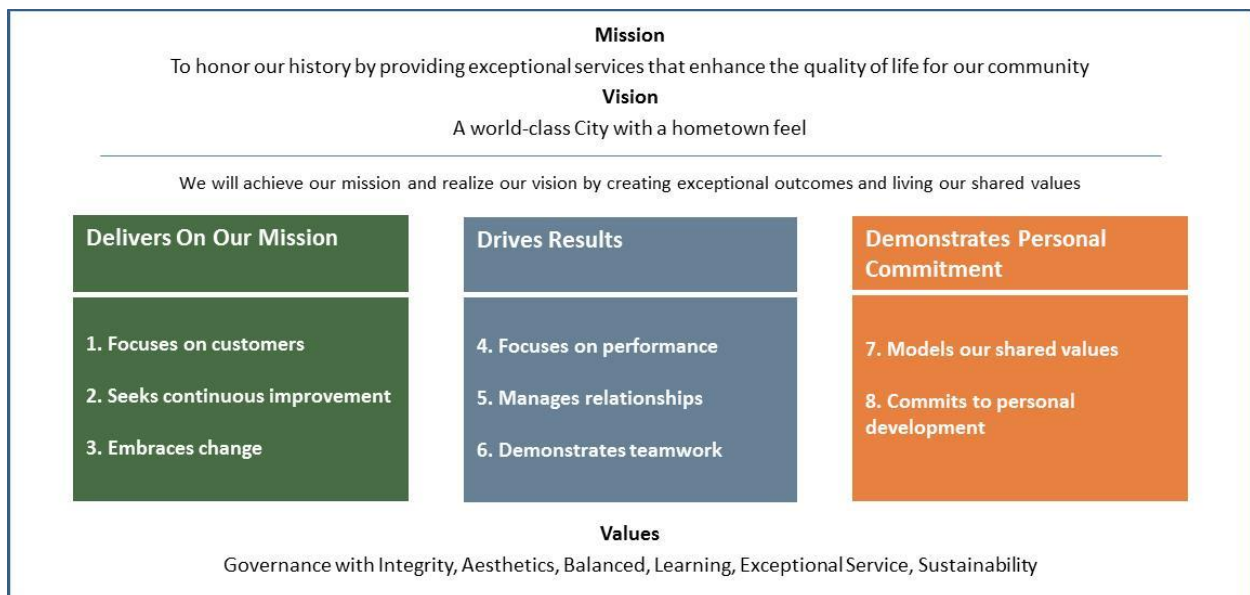
## Coral Gables Employee Excellence Model

The Coral Gables Employee Excellence model defines the critical competencies and behaviors necessary for success in the organization. This model applies to all employees regardless of role, department or level.

Embracing one common model:

- ☑ allows us to focus on building critical capabilities across the organization
- ☑ fosters a learning environment
- ☑ creates a common language for performance
- ☑ supports the development of skills necessary for improving individual effectiveness

### Employee Excellence Model



## Applying the Model to Your Role

This guide defines specific competencies within the Employee Excellence Model for your role as an Individual Contributor. These competencies define the critical behaviors and skills required for success in your role. The model will help you to identify the key opportunities for your learning and growth.

### Employee Excellence Model for an Individual Contributor:

Employee Excellence Framework		Core Behaviors
<b>Focuses on the customer</b>	Actively works to satisfy the needs of customers and strives to exceed their expectations.	<ul style="list-style-type: none"> <li>Engages customers in a friendly and appropriate manner in person, on the phone or electronically</li> <li>Shows respect and responds with courtesy, clarity and accuracy for all inquiries from customers and other departments</li> <li>Effectively diffuses difficult situations</li> <li>Applies sound judgment when responding to issues</li> <li>Quickly and effectively resolves customer problems</li> </ul>
<b>Seeks continuous improvement</b>	Willing to try new ways of working and works to improve processes.	<ul style="list-style-type: none"> <li>Implements solutions that reduce future errors or mistakes</li> <li>Generates and shares creative ideas and suggestions for improvement</li> </ul>
<b>Embraces change</b>	Embraces change and shows resilience in times of uncertainty.	<ul style="list-style-type: none"> <li>Understands and accepts others' points of view and recognizes the value of different approaches</li> <li>Demonstrates openness to new structures, procedures and technology</li> <li>Accepts change even when there is some ambiguity</li> </ul>
<b>Focuses on performance</b>	Sets clear goals and objectives and strives for superior results.	<ul style="list-style-type: none"> <li>Seeks clarity of tasks, asks questions and knows what is expected of them</li> <li>Energetically approaches challenges</li> <li>Demonstrates knowledge of department policies and procedures</li> <li>Sets priorities and organizes self to meet deadlines</li> <li>Reports progress and any potential delays or issues which may impact others</li> <li>Identifies what needs to be done and takes action before being asked</li> </ul>
<b>Manages relationships</b>	Works to effectively communicate; build strong relationships and resolve conflict.	<ul style="list-style-type: none"> <li>Listens attentively to people, ideas and concerns</li> <li>Demonstrates ability to provide explanation and/or options to resolve difficult situations</li> <li>Expresses idea clearly and concisely</li> <li>Able to clearly and accurately explain issues, policies procedures and other information</li> <li>Keeps his/her manager and colleagues informed about progress and problems, avoids surprises</li> </ul>
<b>Demonstrates teamwork</b>	Works cooperatively and productively with others to achieve results.	<ul style="list-style-type: none"> <li>Steps up to support co-worker's tasks when needed or required</li> <li>Respect confidentially of information shared by others</li> <li>Contributes constructively to teamwork</li> <li>Expresses disagreement constructively</li> <li>Respects and welcomes diversity of customers and coworkers</li> <li>Promotes cooperation across departments</li> </ul>
<b>Models our shared values</b>	Is a role model for our values and holds oneself and others accountable.	<ul style="list-style-type: none"> <li>Acts in accordance with the Coral Gables Code of Conduct</li> <li>Models ethical behavior and consistently applies those ethical standards to self and others</li> <li>Is consistent in word and actions</li> <li>Is viewed as trustworthy, honorable, truthful, and respectful of the views of others</li> </ul>
<b>Commits to personal development</b>	Makes an active commitment to continuously grow and develop.	<ul style="list-style-type: none"> <li>Is aware of personal strengths and weaknesses</li> <li>Is committed to their own development and continuous self-improvement, and sees learning opportunities in everyday work</li> <li>Reflects on the reasons for both success and failure, and learns from the experience</li> <li>Actively seeks feedback and modifies their approach to enhance effectiveness</li> </ul>
<b>Other Focus Areas</b>		<b>Core Behaviors</b>
<b>Role specific capabilities</b>	Works to effectively apply specific knowledge, skills and behaviors.	<ul style="list-style-type: none"> <li>Demonstrates the ability to apply the knowledge and skills necessary to effectively perform the role</li> <li>Ability to effectively use the tools and other equipment required for the role</li> </ul>

## Developing Your Learning Plan

Below are four easy steps for developing your learning plan.

### **Step 1: Complete the Self-Assessment and Manager Assessment**

The self-assessment tool is found at the back of this guide. This tool is the foundation for the development of your learning plan. The tool allows you to reflect on the employee excellence behaviors and skills that you use frequently and those that require more development. Completing the tool allows you to identify the learning priorities most important to your development at this point in time. You can use the tool to reassess yourself over time so you can continually adjust your learning priorities and learning plan to reflect your growth and development.

As you use the tool to assess your performance, reflect on each statement carefully and consider examples of how you have demonstrated the behaviors in each section of the tool. There are two scales to select as you complete the assessment, 1) the frequency that you display the behavior and 2) how important you feel the behavior is to your role.

Be honest and objective in your responses to ensure the results are meaningful; your first response is usually the most accurate.

Ask your manager to complete the Manager's Assessment tool at the back of the guide.

### **Step 2: Meet with Your Manager**

This meeting should be considered a positive experience; it is not a performance review discussion. This meeting should be an open and honest discussion of each competency. The discussion should include a review of your examples used to determine your ratings choice, the manager's point of view and the criticality of the behavior to the success in your role.

### **Step 3: Determine Your Learning Priorities:**

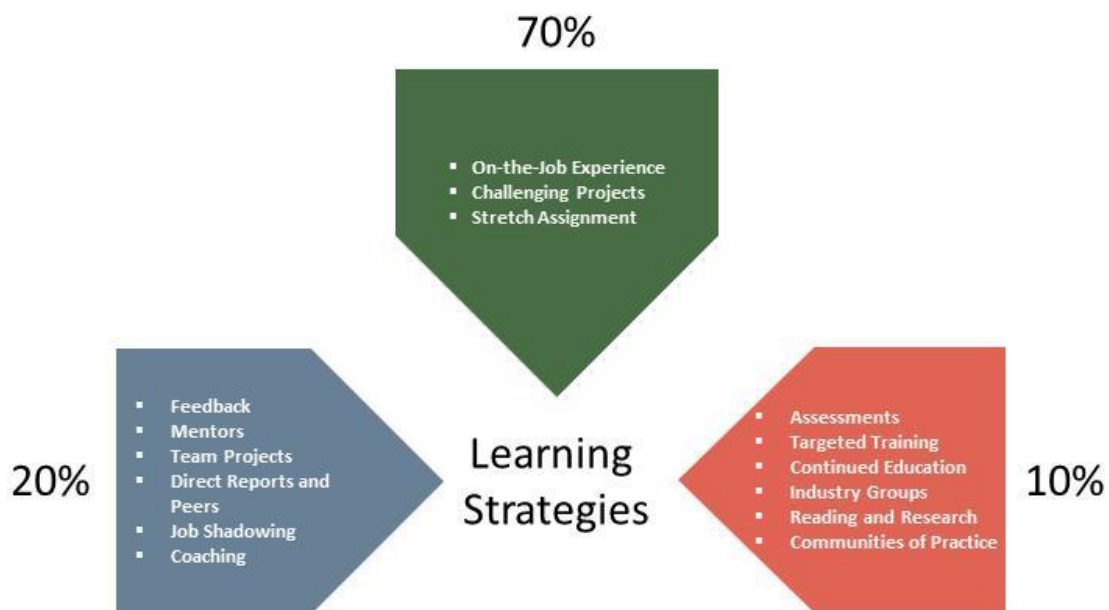
Based on the discussion with your manager and the comparison of results of the two assessments, you will next determine your learning priorities. Your priorities should be focused on learning and development that is of the highest importance to your success in the next 6 – 12 months. Behaviors that you marked as rarely or seldom but are of high importance should indicate your learning priorities.



#### Step 4: Develop Your Plan and Put into Action

Complete a learning plan for each of the competency areas you wish to address. Be realistic in the achievement of your learning goals; prioritize the accomplishment of one or two goals every 6-12 months.

Consider a blended approach when preparing your learning plan. Effective learning actions can come from three sources; 1) learning on the job – 70% of your learning comes from on-the-job experiences, 2) learning from others – 20% of your learning comes from others and 3) learning from formal education – about 10% of your learning comes from formal education like workshops and on0-line courses.



Your plan can include multiple sources and methods for learning. Review the Learning Options and Resources section at the back of this guide for ideas and guidance. As you put together your plan, consider your learning style to create a plan that will be most effective for you and one that will meet your personal needs.

## Self-Assessment Form



Learner's Name:					Date:									
<b>Focuses on the customer</b>					How frequently do you demonstrate this behavior?					How important is this behavior in my current role?				
<b>Actively works to satisfy the needs of customers and strives to exceed their expectations.</b>					<i>Almost Never</i>	<i>Occasionally</i>	<i>Frequently</i>	<i>Almost Always</i>	<i>Not Applicable</i>	<i>Not Important</i>	<i>Somewhat Important</i>	<i>Important</i>	<i>Critical</i>	<i>Priority Learning</i>
Engages customers in a friendly and appropriate manner in person, on the phone or electronically					<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Shows respect and responds with courtesy, clarity and accuracy for all inquiries from customers and other departments					<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Effectively diffuses difficult situations					<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Applies sound judgment when responding to issues					<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Quickly and effectively resolves customer problems					<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Seeks Continuous Improvement</b>					How frequently do you demonstrate this behavior?					How important is this behavior in my current role?				
<b>Willingness to try new ideas and new ways of working.</b>					<i>Almost Never</i>	<i>Occasionally</i>	<i>Frequently</i>	<i>Almost Always</i>	<i>Not Applicable</i>	<i>Not Important</i>	<i>Somewhat Important</i>	<i>Important</i>	<i>Critical</i>	<i>Priority Learning</i>
Implements solutions that reduce future errors or mistakes					<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Generates and shares creative ideas and suggestions for improvement					<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Embraces change</b>					How frequently do you demonstrate this behavior?					How important is this behavior in my current role?				
<b>Embraces change and shows resilience in times of uncertainty.</b>					<i>Almost Never</i>	<i>Occasionally</i>	<i>Frequently</i>	<i>Almost Always</i>	<i>Not Applicable</i>	<i>Not Important</i>	<i>Somewhat Important</i>	<i>Important</i>	<i>Critical</i>	<i>Priority Learning</i>
Understands and accepts others' points of view and recognizes the value of different approaches					<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Demonstrates openness to new structures, procedures and technology					<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Accepts change even when there is some ambiguity					<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Focuses on performance	How frequently do you demonstrate this behavior?					How important is this behavior in my current role?				
	Almost Never	Occasionally	Frequently	Almost Always	Not Applicable	Not Important	Somewhat Important	Important	Critical	Priority Learning
<b>Sets clear goals and objectives and strives for superior results.</b>										
Seeks clarity of tasks, asks questions and knows what is expected of them	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Energetically approaches challenges	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Demonstrates knowledge of department policies and procedures	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Sets priorities and organizes self to meet deadlines	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Reports progress and any potential delays or issues which may impact others	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Identifies what needs to be done and takes action before being asked	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Manages Relationships	How frequently do you demonstrate this behavior?					How important is this behavior in my current role?				
	Almost Never	Occasionally	Frequently	Almost Always	Not Applicable	Not Important	Somewhat Important	Important	Critical	Priority Learning
<b>Works to effectively communicate; build strong relationships and resolve conflict.</b>										
Listens attentively to people, ideas and concerns	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Demonstrates ability to provide explanation and/or options to resolve difficult situations	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Expresses idea clearly and concisely	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Able to clearly and accurately explain issues, policies procedures and other information	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Keeps his/her manager informed about progress and problems, avoids surprises	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Demonstrates teamwork	How frequently do you demonstrate this behavior?					How important is this behavior in my current role?				
	Almost Never	Occasionally	Frequently	Almost Always	Not Applicable	Not Important	Somewhat Important	Important	Critical	Priority Learning
<b>Works cooperatively and productively with others to achieve results.</b>										
Respects confidentiality of information shared by others	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Contributes constructively to teamwork	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Expresses disagreement constructively	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Respects and welcomes diversity of customers and co-workers	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Promotes cooperation across departments	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Technical Skills	How frequently do you demonstrate this behavior?					How important is this behavior in my current role?				
	Almost Never	Occasionally	Frequently	Almost Always	Not Applicable	Not Important	Somewhat Important	Important	Critical	Priority Learning
<b>Demonstrates the knowledge and proficient use of the tools and equipment required to perform your role.</b>										
Ability to effectively use the tools and other equipment required for your role	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Demonstrates the ability to apply the knowledge and skills necessary to effectively perform your role	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

## Manager’s Assessment Form

This assessment tool is a framework to provide feedback to your employee and assist in the development of their learning plan. Please complete the form below in preparation for a learning plan discussion with your employee.

<b>Learner’s Name:</b>						
<b>Focuses on the customer</b>	✓ If A Priority for the Employee	How frequently does your employee demonstrate this behavior?				
<b>Actively works to satisfy the needs of customers and strives to exceed their expectations.</b>		Almost Never	Occasionally	Frequently	Almost Always	Not Applicable
Engages customers in a friendly and appropriate manner in person, on the phone or electronically	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Shows respect and responds with courtesy, clarity and accuracy for all inquiries from customers and other departments	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Effectively diffuses difficult situations	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Applies sound judgment when responding to issues	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Quickly and effectively resolves customer problems	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Seeks Continuous Improvement</b>	✓ If A Priority for the Employee	How frequently does your employee demonstrate this behavior?				
<b>Willingness to try new ideas and new ways of working.</b>		Almost Never	Occasionally	Frequently	Almost Always	Not Applicable
Implements solutions that reduce future errors or mistakes	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Generates and shares creative ideas and suggestions for improvement	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Embraces change</b>	✓ If A Priority for the Employee	How frequently does your employee demonstrate this behavior?				
<b>Embraces change and shows resilience in times of uncertainty.</b>		Almost Never	Occasionally	Frequently	Almost Always	Not Applicable
Understands and accepts others’ points of view and recognizes the value of different approaches	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Demonstrates openness to new structures, procedures and technology	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Accepts change even when there is some ambiguity	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Focuses on performance	✓ If A Priority for the Employee	How frequently does your employee demonstrate this behavior?				
		Almost Never	Occasionally	Frequently	Almost Always	Not Applicable
<b>Sets clear goals and objectives and strives for superior results</b>						
Seeks clarity of tasks, asks questions and knows what is expected of them	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Energetically approaches challenges	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Demonstrates knowledge of department policies and procedures	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Sets priorities and organizes self to meet deadlines	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Reports progress and any potential delays or issues which may impact others	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Identifies what needs to be done and takes action before being asked	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Manages relationships	✓ If A Priority for the Employee	How frequently does your employee demonstrate this behavior?				
		Almost Never	Occasionally	Frequently	Almost Always	Not Applicable
<b>Works to effectively communicate; build strong relationships and resolve conflict.</b>						
Listens attentively to people, ideas and concerns	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Demonstrates ability to provide explanation and/or options to resolve difficult situations	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Expresses idea clearly and concisely	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Able to clearly and accurately explain issues, policies procedures and other information	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Listens attentively to people, ideas and concerns	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Keeps his/her manager informed about progress and problems, avoids surprises						
Demonstrates teamwork	✓ If A Priority for the Employee	How frequently does your employee demonstrate this behavior?				
		Almost Never	Occasionally	Frequently	Almost Always	Not Applicable
<b>Working cooperatively and productively with others to achieve results.</b>						
Respects confidentiality of information shared by others	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Contributes proactively to teamwork	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Expresses disagreement constructively	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Respects and welcomes diversity of customers and co-workers	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Promotes cooperation across departments	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Technical Skills	✓ If A Priority for the Employee	How frequently does your employee demonstrate this behavior?				
		Almost Never	Occasionally	Frequently	Almost Always	Not Applicable
<b>Demonstrates the knowledge and proficient use of the tools and equipment to perform.</b>						
Ability to effectively use the tools and other equipment required for your role	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Demonstrates to apply the knowledge and skills necessary to effectively perform your role	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

## Learning Plan Template



### Employee Learning Plan

Name:		Date:
-------	--	-------

#### Learning Priority 1

<b>Competency:</b>		
<b>Behavior/skill I want to develop:</b>		
<b>My Action Plan</b>		
<b>On-the-job learning experiences</b>	<b>People I can learn from</b>	<b>Formal learning activity</b>
<b>Target Date for Completion:</b>		

#### Learning Priority 2

<b>Competency:</b>		
<b>Behavior/skill I want to develop:</b>		
<b>My Action Plan</b>		
<b>On-the-job learning experiences</b>	<b>People I can learn from</b>	<b>Formal learning activity</b>
<b>Target Date for Completion:</b>		



## Learning Options and Resources

*Note: This section will offer more options as we bring on our on-line learning platform – for now it is a placeholder page.....*

### Learning Options and Ideas:

- Books, articles and procedure manuals
- On the job experiences
- E-learning programs
- Coaching and mentor relationships
- Workshops or courses
- Development opportunities

### On-line learning Available by Competency Area:

Competency Area	Recommended On-line Learning Course(s)
Focuses on the Customer	<ul style="list-style-type: none"><li>• Customer Service Skills</li><li>• Essentials of Customer Service</li></ul>
Seeks Continuous Improvement	<ul style="list-style-type: none"><li>• Problem Solving Techniques</li><li>• Unleashing Personal and Team Creativity</li></ul>
Embraces Change	<ul style="list-style-type: none"><li>• Navigating through organizational change</li></ul>
Focuses on Performance	<ul style="list-style-type: none"><li>• Improving Your Personal Productivity</li><li>• Time Management</li><li>• Performing Under Pressure</li></ul>
Manages Relationships	<ul style="list-style-type: none"><li>• Skills for Communication Success</li><li>• Cultivating Relationships with Your Peers</li><li>• Managing Upward Relationships</li></ul>
Demonstrates Teamwork	<ul style="list-style-type: none"><li>• Being an Effective Team Member</li></ul>
Technical Skills	<ul style="list-style-type: none"><li>• Microsoft office tools – Word PowerPoint, Excel</li><li>• Writing Effective emails</li><li>• Effective Business writing</li><li>• Essential Skills for Professional Phone Calls</li></ul>

# Employee Excellence Model Behaviors for People Leaders

<b>Delivers On Our Mission</b>	<b>1. Focuses on customers</b>	Actively works to understand the needs of customers and stakeholders. Encourages a strong customer-focus and builds understanding of customer perspectives within their team. Shows respect for customers and stakeholders
	<b>2. Seeks continuous improvement</b>	Encourages creativity and innovation. Identifies and implements improved ways of doing things. Analyses both success and failure to identify opportunities for improvement.
	<b>3. Embraces change</b>	Adopts a planned and comprehensive approach to implementing organizational change. Understands and influences organizational culture. Communicates the positive side of change for the team and organization. Assists the team to adapt to a changing environment.
<b>Drives Results</b>	<b>4. Focuses on performance</b>	Implements systems and processes to ensure ongoing delivery. Organizes various resources (people, funding, material, support) to achieve results. Measures and monitors the performance of their area (Staff performance, budget).
	<b>5. Manages relationships</b>	Builds and maintains productive relationships with internal and external stakeholders. Communicates in a way that is appropriate for the situation, and that promotes trust, respect and integrity. Models open communication. Actively and attentively listens to others. Understands different and competing views, and synthesizes stakeholder information to inform approach.
	<b>6. Demonstrates teamwork</b>	Develops staff for high performance through providing appropriate guidance and support. Understands and can articulate the strengths and limitations of their direct reports and staff. Develops the knowledge, skills and abilities of their direct reports, and other staff within their group. Encourages opportunities for learning and stretch assignments to build capability.
<b>Demonstrates Personal Commitment</b>	<b>7. Models our shared values</b>	Models ethical behavior and consistently applies those ethical standards to self and others. Is consistent in word and actions. Is viewed as trustworthy, honorable and truthful, and respectful of the views of others.
	<b>8. Commits to personal development</b>	Is aware of personal strengths and weaknesses and is committed to their own development and continuous self-improvement. Sees learning opportunities in everyday work. Actively seeks feedback and modifies their approach to enhance leadership effectiveness.

# One Page Guide for Leaders: Employee Excellence Process

The Employee Excellence Process is a simple four step process that defines our approach to performance management with the Employee Excellence Model at the core. The Employee Excellence Model is aligned with our strategic objectives and describes the behaviors and expectations that will enable us to meet those objectives. These behaviors apply to all employees across the organization. The four steps of the process define the conversations that you, as a leader, are expected to be conducting with your team over the course of the year. Most of these conversations last no longer than 15 minutes and can have a significant impact on the productivity and engagement of all your employees.



# One Page Guide for Leaders: Employee Excellence Process

## The Four Key Steps of the Employee Excellence Process

There are four key conversations and steps and each is described below:

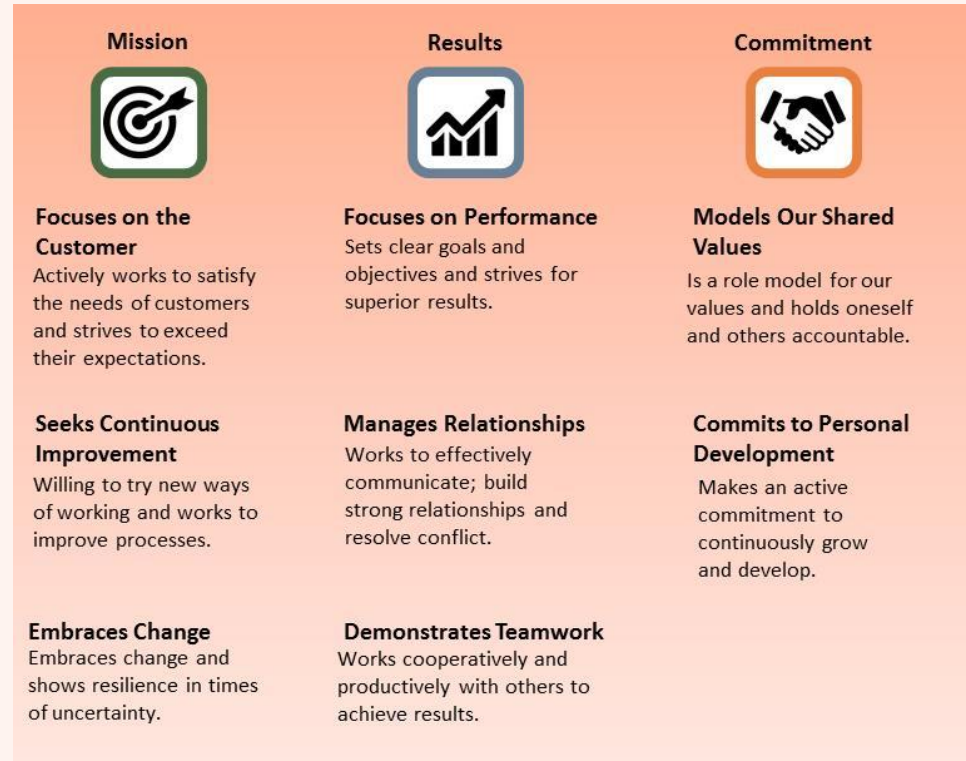
**Step 1: Goal Setting** – in this step you will work with your employee to set goals for the coming year, clarify work expectations and ensure they have a good understanding of how their work contributes to the success of the team.

**Step 2: Development Planning** – in this step you will support your employee as they create a development plan that will foster their continued growth and development. The plan is created and owned by the employee but your input and guidance is critical to their success.

**Step 3 – Everyday Coaching** – this step captures the everyday conversations you have with employees to provide feedback and coaching to ensure they are performing at their best level.

**Step 4: The Annual Review** – in this step you will deliver the formal performance review to your employee. This should be a recap of the progress against the goals agreed in Step 1, progress on the Development Plan and a summary of the coaching conversations you have been having over the course of the year. This review should not contain any “surprises” for the employee.

*The Employee Excellence behaviors form the foundation of your conversations.*



# Employee Development Planning

Guide for People Leaders



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## Overview

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### Introduction

The City of Coral Gables is committed to the development and growth of all our employees. Focusing on learning and continuously building our capabilities will ensure we can meet and exceed the expectations of our customers today and be prepared for future opportunities and challenges.

This guide was developed to support your learning and development and is designed to provide the framework and tools for you to identify and prioritize your learning needs and enable you to achieve your career aspirations.



### What is an Employee Development Plan?

Employee development planning is a process used actively by both you and your leader to ensure you are growing professionally, developing your ability to achieve more in the workplace, and contribute to meeting the organization's goals. The employee development plan is an action plan that captures the goals, actions and measures of success for your development.

Employee development planning is an **employee-directed** activity; you are responsible for creating and implementing your own plan. Your leader plays a critical, supportive role in the process.

An effective learning plan:

- **Is created and owned by you**
- Has the sincere support of your manager and the organization
- Is customized to your career interests and goals
- Is realistic and achievable
- Is something you can begin working on immediately
- Includes a variety of on-the-job activities and involvement of others
- Identifies how progress will be monitored and measured
- Is reviewed and updated on a regular basis

The responsibility for continuous learning rests with you and your personal motivation to learn. Your leader plays an important role in providing the coaching and feedback on your performance and guidance in the development of your plan.

If you have any questions or require additional support please contact Craig DeWald in the Human Resources Department (X5524).

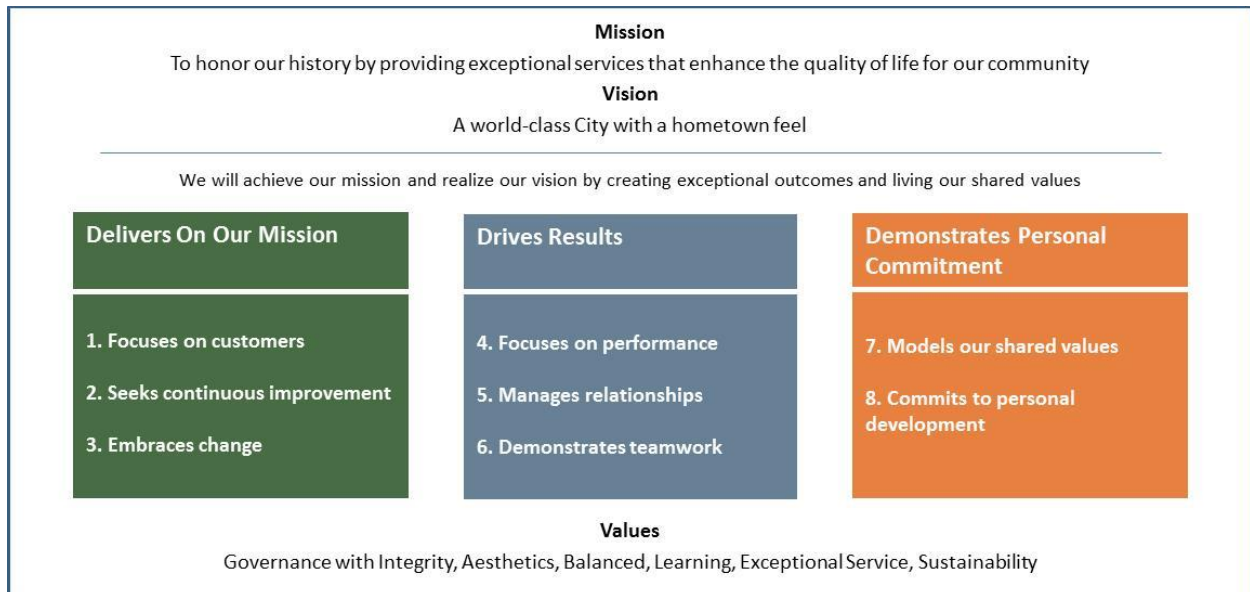
## Coral Gables Employee Excellence Model

The Coral Gables Employee Excellence framework defines the critical competencies and behaviors necessary for success in the organization. This model applies to all employees regardless of role, department or level.

Embracing one common model:

- allows us to focus on building critical capabilities across the organization
- fosters a learning environment
- creates a common language for performance
- supports the development of skills necessary for improving individual effectiveness

### Employee Excellence Model



## Applying the Model to Your Role

This guide defines specific competencies within the Employee Excellence Model for your role as a People Leader. These competencies define the critical behaviors and skills required for success in your role. The model will help you to identify the key opportunities for your learning and growth.

### Employee Excellence Model for a People Leader:

Employee Excellence Framework		Core Behaviors	People Leader Behaviors
<b>Focuses on the customer</b>	Actively works to satisfy the needs of customers and strives to exceed their expectations.	<ul style="list-style-type: none"> <li>Engages customers in a friendly and appropriate manner in person, on the phone or electronically</li> <li>Shows respect and responds with courtesy, clarity and accuracy for all inquiries from customers and other departments</li> <li>Effectively diffuses difficult situations</li> <li>Applies sound judgment when responding to issues</li> <li>Quickly and effectively resolves customer problems</li> </ul>	<ul style="list-style-type: none"> <li>Actively works to understand the needs of customers and stakeholders across departments</li> <li>Encourages a strong customer focus and builds understanding of customer perspectives within their team</li> <li>Shows respect for customers and stakeholders</li> </ul>
<b>Seeks continuous improvement</b>	Willing to try new ways of working and works to improve processes.	<ul style="list-style-type: none"> <li>Implements solutions that reduce future errors or mistakes</li> <li>Generates and shares creative ideas and suggestions for improvement</li> </ul>	<ul style="list-style-type: none"> <li>Encourages creativity and innovation</li> <li>Identifies and implements improved ways of doing things</li> <li>Analyses both success and failure to identify opportunities for improvement</li> </ul>
<b>Embraces change</b>	Embraces change and shows resilience in times of uncertainty.	<ul style="list-style-type: none"> <li>Understands and accepts others' points of view and recognizes the value of different approaches</li> <li>Demonstrates openness to new structures, procedures and technology</li> <li>Accepts change even when there is some ambiguity</li> </ul>	<ul style="list-style-type: none"> <li>Adopts a planned and comprehensive approach to implementing organizational change</li> <li>Understands and influences organizational culture</li> <li>Communicates the positive side of change for the team and organization</li> <li>Assists the team to adapt to a changing environment</li> </ul>
<b>Focuses on performance</b>	Sets clear goals and objectives and strives for superior results.	<ul style="list-style-type: none"> <li>Seeks clarity of tasks, asks questions and knows what is expected of them</li> <li>Energetically approaches challenges</li> <li>Demonstrates knowledge of department policies and procedures</li> <li>Sets priorities and organizes self to meet deadlines</li> <li>Reports progress and any potential delays or issues which may impact others</li> <li>Identifies what needs to be done and takes action before being asked</li> </ul>	<ul style="list-style-type: none"> <li>Clearly communicates goals, priorities and vision</li> <li>Recognizes achievement of individuals and team</li> <li>Implements systems and processes to ensure ongoing effectiveness and efficiency</li> <li>Organizes various resources (people, funding, material, support) to achieve results</li> <li>Measures and monitors the performance of their area (staff performance, budget, projects)</li> </ul>
<b>Manages relationships</b>	Works to effectively communicate; build strong relationships and resolve conflict.	<ul style="list-style-type: none"> <li>Listens attentively to people, ideas and concerns</li> <li>Demonstrates ability to provide explanation and/or options to resolve difficult situations</li> <li>Expresses idea clearly and concisely</li> <li>Able to clearly and accurately explain issues, policies procedures and other information</li> <li>Keeps his/her manager and colleagues informed about progress and problems, avoids surprises</li> </ul>	<ul style="list-style-type: none"> <li>Builds and maintains productive relationships with internal and external stakeholders</li> <li>Communicates in a way that is appropriate for the situation, and that promotes trust, respect and integrity</li> <li>Models open communication. Actively and attentively listens to others</li> <li>Understands different and competing views, and synthesizes stakeholder information to inform approach</li> </ul>

<b>Demonstrates teamwork</b>	Works cooperatively and productively with others to achieve results.	<ul style="list-style-type: none"> <li>• Steps up to support co-worker’s tasks when needed or required</li> <li>• Respect confidentiality of information shared by others</li> <li>• Contributes constructively to teamwork</li> <li>• Expresses disagreement constructively</li> <li>• Respects and welcomes diversity of customers and coworkers</li> <li>• Promotes cooperation across departments</li> </ul>	<ul style="list-style-type: none"> <li>• Develops staff for high performance through providing appropriate guidance and support</li> <li>• Understands and can articulate the strengths and limitations of their direct reports and staff</li> <li>• Develops the knowledge, skills and abilities of their direct reports, and other staff within their group</li> <li>• Encourages opportunities for learning and stretch assignments to build capability</li> </ul>
<b>Models our shared values</b>	Is a role model for our values and holds oneself and others accountable.	<ul style="list-style-type: none"> <li>• Acts in accordance with the Coral Gables Code of Conduct</li> <li>• Models ethical behavior and consistently applies those ethical standards to self and others</li> <li>• Is consistent in word and actions</li> <li>• Is viewed as trustworthy, honorable, truthful, and respectful of the views of others</li> </ul>	<ul style="list-style-type: none"> <li>• Models ethical behavior and consistently applies those ethical standards to self and others</li> <li>• Is consistent in word and actions</li> <li>• Is viewed as trustworthy, honorable, truthful and respectful of the views of others</li> </ul>
<b>Commits to personal development</b>	Makes an active commitment to continuously grow and develop.	<ul style="list-style-type: none"> <li>• Is aware of personal strengths and weaknesses</li> <li>• Is committed to their own development and continuous self-improvement, and sees learning opportunities in everyday work</li> <li>• Reflects on the reasons for both success and failure, and learns from the experience</li> <li>• Actively seeks feedback and modifies their approach to enhance effectiveness</li> </ul>	<ul style="list-style-type: none"> <li>• Actively seeks feedback and modifies their approach to enhance leadership effectiveness</li> </ul>
<b>Other Focus Areas</b>		<b>Core Behaviors</b>	
<b>Role specific capabilities</b>	Works to effectively apply specific knowledge, skills and behaviors.	Demonstrates the ability to apply the knowledge and skills necessary to effectively perform the role Ability to effectively use the tools and other equipment required for the role	

## Creating Your Development Plan

Below are four easy steps for creating your development plan.

### **Step 1: Complete the Self-Assessment and Manager Assessment**

The self-assessment tool is found at the back of this guide. This tool is the foundation for the development of your learning plan. The tool allows you to reflect on the employee excellence behaviors and skills that you use frequently and those that require more development. Completing the tool allows you to identify the learning priorities most important to your development at this point in time. You can use the tool to reassess yourself over time so you can continually adjust your learning priorities and learning plan to reflect your growth and development.

As you use the tool to assess your performance, reflect on each statement carefully and consider examples of how you have demonstrated the behaviors in each section of the tool. There are two scales to select as you complete the assessment, 1) the frequency that you display the behavior and 2) how important you feel the behavior is to your role.

Be honest and objective in your responses to ensure the results are meaningful; your first response is usually the most accurate.

Ask your manager to complete the Manager's Assessment tool at the back of the guide.

### **Step 2: Meet with Your Manager**

This meeting should be considered a positive experience; it is not a performance review discussion. This meeting should be an open and honest discussion of each competency. The discussion should include a review of your examples used to determine your ratings choice, the manager's point of view and the criticality of the behavior to the success in your role.

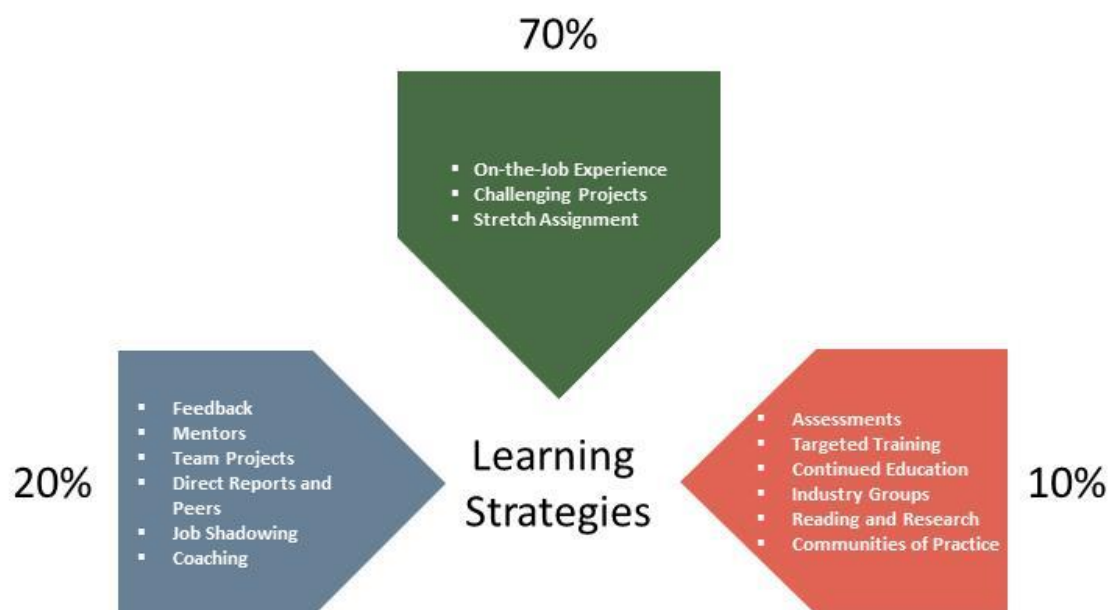
### **Step 3: Determine Your Learning Priorities:**

Based on the discussion with your manager and the comparison of results of the two assessments, you will next determine your learning priorities. Your priorities should be focused on learning and development that is of the highest importance to your success in the next 6 – 12 months. Behaviors that you marked as rarely or seldom but are of high importance should indicate your learning priorities.

#### Step 4: Create Your Development Plan and Put into Action

Complete a plan for each of the competency areas you wish to address. Be realistic in the achievement of your learning goals; prioritize the accomplishment of one or two goals every 6-12 months.

Consider a blended approach when preparing your learning plan. Effective learning actions can come from three sources; 1) learning on the job – 70% of your learning comes from on-the-job experiences, 2) learning from others – 20% of your learning comes from others and 3) learning from formal education – about 10% of your learning comes from formal education like workshops and on0-line courses.



Your plan can include multiple sources and methods for learning. Review the Learning Options and Resources section at the back of this guide for ideas and guidance. As you put together your plan, consider your learning style to create a plan that will be most effective for you and one that will meet your personal needs.

## Self-Assessment Form



Learner's Name:						Date:																			
<b>Focuses on the customer</b>						<b>How frequently do you demonstrate this behavior?</b>					<b>How important is this behavior in my current role?</b>														
<b>Actively works to satisfy the needs of customers and strives to exceed their expectations.</b>						<i>Almost Never</i>	<i>Occasionally</i>	<i>Frequently</i>	<i>Almost Always</i>	<i>Not Applicable</i>						<i>Not Important</i>	<i>Somewhat Important</i>	<i>Important</i>	<i>Critical</i>	<i>Priority Learning</i>					
											<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>						<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
											<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>						<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
											<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>						<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
											<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>						<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Seeks Continuous Improvement</b>						<b>How frequently do you demonstrate this behavior?</b>					<b>How important is this behavior in my current role?</b>														
<b>Willingness to try new ideas and new ways of working.</b>						<i>Almost Never</i>	<i>Occasionally</i>	<i>Frequently</i>	<i>Almost Always</i>	<i>Not Applicable</i>						<i>Not Important</i>	<i>Somewhat Important</i>	<i>Important</i>	<i>Critical</i>	<i>Priority Learning</i>					
											<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>						<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
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											<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>						<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
											<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>						<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Embraces change</b>						<b>How frequently do you demonstrate this behavior?</b>					<b>How important is this behavior in my current role?</b>														
<b>Embraces change and shows resilience in times of uncertainty.</b>						<i>Almost Never</i>	<i>Occasionally</i>	<i>Frequently</i>	<i>Almost Always</i>	<i>Not Applicable</i>						<i>Not Important</i>	<i>Somewhat Important</i>	<i>Important</i>	<i>Critical</i>	<i>Priority Learning</i>					
											<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>						<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
											<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>						<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
											<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>						<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
											<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>						<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Focuses on performance</b>						<b>How frequently do you demonstrate this behavior?</b>					<b>How important is this behavior in my current role?</b>														
<b>Sets clear goals and objectives and strives for superior results.</b>						<i>Almost Never</i>	<i>Occasionally</i>	<i>Frequently</i>	<i>Almost Always</i>	<i>Not Applicable</i>						<i>Not Important</i>	<i>Somewhat Important</i>	<i>Important</i>	<i>Critical</i>	<i>Priority Learning</i>					
											<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>						<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
											<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>						<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
											<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>						<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
											<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>						<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>



Organizes various resources (people, funding, material, support) to achieve results	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Measures and monitors the performance of their area (staff performance, budget, projects)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Manages Relationships</b>	How frequently do you demonstrate this behavior?					How important is this behavior in my current role?				
<b>Works to effectively communicate; build strong relationships and resolve conflict.</b>	<i>Almost Never</i>	<i>Occasionally</i>	<i>Frequently</i>	<i>Almost Always</i>	<i>Not Applicable</i>	<i>Not Important</i>	<i>Somewhat Important</i>	<i>Important</i>	<i>Critical</i>	<i>Priority Learning</i>
Builds and maintains productive relationships with internal and external stakeholders	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Communicates in a way that is appropriate for the situation, and that promotes trust, respect and integrity	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Models open communication. Actively and attentively listens to others	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Understands different and competing views, and synthesizes stakeholder information to inform approach	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Demonstrates teamwork</b>	How frequently do you demonstrate this behavior?					How important is this behavior in my current role?				
<b>Works cooperatively and productively with others to achieve results.</b>	<i>Almost Never</i>	<i>Occasionally</i>	<i>Frequently</i>	<i>Almost Always</i>	<i>Not Applicable</i>	<i>Not Important</i>	<i>Somewhat Important</i>	<i>Important</i>	<i>Critical</i>	<i>Priority Learning</i>
Develops staff for high performance through providing appropriate guidance and support	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Understands and can articulate the strengths and limitations of their direct reports and staff	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Develops the knowledge, skills and abilities of their direct reports, and other staff within their group	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Encourages opportunities for learning and stretch assignments to build capability	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Technical Skills</b>	How frequently do you demonstrate this behavior?					How important is this behavior in my current role?				
<b>Demonstrates the knowledge and proficient use of the tools and equipment required to perform your role.</b>	<i>Almost Never</i>	<i>Occasionally</i>	<i>Frequently</i>	<i>Almost Always</i>	<i>Not Applicable</i>	<i>Not Important</i>	<i>Somewhat Important</i>	<i>Important</i>	<i>Critical</i>	<i>Priority Learning</i>
Ability to effectively use the tools and other equipment required for your role	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Demonstrates the ability to apply the knowledge and skills necessary to effectively perform your role	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

## Manager's Assessment Form

This assessment tool is a framework to provide feedback to your employee and assist in the development of their learning plan. Please complete the form below in preparation for a learning plan discussion with your employee.

<b>Learner's Name:</b>						
<b>Focuses on the customer</b>	✓ If A Priority for the Employee	How frequently does your employee demonstrate this behavior?				
<i>Actively works to satisfy the needs of customers and strives to exceed their expectations.</i>		<i>Almost Never</i>	<i>Occasionally</i>	<i>Frequently</i>	<i>Almost Always</i>	<i>Not Applicable</i>
Actively works to understand the needs of customers and stakeholders across departments	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Encourages a strong customer focus and builds understanding of customer perspectives within their team	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Shows respect for customers and stakeholders	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Seeks Continuous Improvement</b>	✓ If A Priority for the Employee	How frequently does your employee demonstrate this behavior?				
<i>Willingness to try new ideas and new ways of working.</i>		<i>Almost Never</i>	<i>Occasionally</i>	<i>Frequently</i>	<i>Almost Always</i>	<i>Not Applicable</i>
Encourages creativity and innovation	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Identifies and implements improved ways of doing things	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Analyses both success and failure to identify opportunities for improvement	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Embraces change</b>	✓ If A Priority for the Employee	How frequently does your employee demonstrate this behavior?				
<i>Embraces change and shows resilience in times of uncertainty.</i>		<i>Almost Never</i>	<i>Occasionally</i>	<i>Frequently</i>	<i>Almost Always</i>	<i>Not Applicable</i>
Adopts a planned and comprehensive approach to implementing organizational change	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Understands and influences organizational culture	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Communicates the positive side of change for the team and organization	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Assists the team to adapt to a changing environment	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Focuses on performance	✓ If A Priority for the Employee	How frequently does your employee demonstrate this behavior?				
		Almost Never	Occasionally	Frequently	Almost Always	Not Applicable
<b>Sets clear goals and objectives and strives for superior results</b>						
Clearly communicates goals, priorities and vision	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Recognizes achievement of individuals and team	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Implements systems and processes to ensure ongoing effectiveness and efficiency	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Organizes various resources (people, funding, material, support) to achieve results	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Measures and monitors the performance of their area (staff performance, budget, projects)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Manages relationships	✓ If A Priority for the Employee	How frequently does your employee demonstrate this behavior?				
		Almost Never	Occasionally	Frequently	Almost Always	Not Applicable
<b>Works to effectively communicate; build strong relationships and resolve conflict.</b>						
Builds and maintains productive relationships with internal and external stakeholders	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Communicates in a way that is appropriate for the situation, and that promotes trust, respect and integrity	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Models open communication. Actively and attentively listens to others	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Understands different and competing views, and synthesizes stakeholder information to inform approach	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Demonstrates teamwork	✓ If A Priority for the Employee	How frequently does your employee demonstrate this behavior?				
		Almost Never	Occasionally	Frequently	Almost Always	Not Applicable
<b>Working cooperatively and productively with others to achieve results.</b>						
Develops staff for high performance through providing appropriate guidance and support	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Understands and can articulate the strengths and limitations of their direct reports and staff	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Develops the knowledge, skills and abilities of their direct reports, and other staff within their group	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Encourages opportunities for learning and stretch assignments to build capability	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Technical Skills	✓ If A Priority for the Employee	How frequently does your employee demonstrate this behavior?				
		Almost Never	Occasionally	Frequently	Almost Always	Not Applicable
<b>Demonstrates the knowledge and proficient use of the tools and equipment to perform.</b>						
Ability to effectively use the tools and other equipment required for your role	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Demonstrates to apply the knowledge and skills necessary to effectively perform your role	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

## Development Plan Template



### Employee Development Plan

Name:		Date:	
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#### Learning Priority 1

<b>Competency:</b>		
<b>Behavior/skill I want to develop:</b>		
<b>My Action Plan</b>		
<b>On-the-job learning experiences</b>	<b>People I can learn from</b>	<b>Formal learning activity</b>
<b>Target Date for Completion:</b>		

#### Learning Priority 2

<b>Competency:</b>		
<b>Behavior/skill I want to develop:</b>		
<b>My Action Plan</b>		
<b>On-the-job learning experiences</b>	<b>People I can learn from</b>	<b>Formal learning activity</b>
<b>Target Date for Completion:</b>		

## Learning Options and Resources

*Note: This section will offer more options as we bring on our on-line learning platform – for now it is a placeholder page.....*

### Learning Options and Ideas:

- Books, articles and procedure manuals
- On the job experiences
- E-learning programs
- Coaching and mentor relationships
- Workshops or courses
- Development opportunities

### On-line learning Available by Competency Area:

Competency Area	Recommended On-line Learning Course(s)
Focuses on the Customer	<ul style="list-style-type: none"> <li>• Customer Service Skills</li> <li>• Essentials of Customer Service</li> </ul>
Seeks Continuous Improvement	<ul style="list-style-type: none"> <li>• Problem Solving Techniques</li> <li>• Unleashing Personal and Team Creativity</li> </ul>
Embraces Change	<ul style="list-style-type: none"> <li>• Navigating through organizational change</li> </ul>
Focuses on Performance	<ul style="list-style-type: none"> <li>• Improving Your Personal Productivity</li> <li>• Time Management</li> <li>• Performing Under Pressure</li> </ul>
Manages Relationships	<ul style="list-style-type: none"> <li>• Skills for Communication Success</li> <li>• Cultivating Relationships with Your Peers</li> <li>• Managing Upward Relationships</li> </ul>
Demonstrates Teamwork	<ul style="list-style-type: none"> <li>• Being an Effective Team Member</li> </ul>
Technical Skills	<ul style="list-style-type: none"> <li>• Microsoft office tools – Word PowerPoint, Excel</li> <li>• Writing Effective emails</li> <li>• Effective Business writing</li> <li>• Essential Skills for Professional Phone Calls</li> </ul>

# One Page Worksheet for SMART Goals

SMART is an acronym that you can use to guide your goal setting, it stand for Specific, Measureable, Achievable, Relevant and Time bound. All of the factors help you to set clear structured goals that will have an impact and keep you focused throughout the year.

## 1. Be Specific

As you write your goals, you should be clear and specific about what you are working to accomplish.

When drafting your goal, try to answer the five "W" questions:

- **What** do I want to accomplish?
- **Why** is this goal important?
- **Who** is involved?
- **Where** is it located?
- **Which** resources or limits are involved?

## 2. Make Sure You Can Measure Your Success

Creating measurable goals ensures you can track your progress over time.

A measurable goal should address questions such as:

- How much? How many?
- What's the target performance?
- How will I know when it is accomplished?

## 3. Ensure that Your Goal is Achievable

Your goal needs to be attainable and should also provide a stretch your skills and abilities . This allows us to grow and develop and lead to opportunities and innovation.

An achievable goal will usually answer questions such as:

- How can I accomplish this goal?
- How realistic is the goal, based on other constraints, such as time, resources and financial factors?

**Specific**

**Measurable**

**Achievable**

# One Page Worksheet for SMART Goals

## 4. Make the Goal Relevant

This step is about ensuring that your goal matters to you and is aligned with the goals of your department and your role. This helps to make sure that your goals drive the department forward, but that you're still responsible for achieving your own goal.

A relevant goal can answer "yes" to these questions:

- Does this goal seem worthwhile?
- Is this the right time for this project?
- Does this match other department efforts/needs?
- Does this goal align with the strategy?

## 5. Time-bound

Goals need a target date to help you stay focused and something to work toward. Defining a timeframe for your goals ensures that your goals remain the priority and help you to balance short term activity with your longer-term goals

A time-bound goal will usually answer these questions:

- When will this goal be completed?
- Can I break this goal into smaller time-bound steps?

Relevant

Time-bound

*A Goal Properly Set Is A Goal Half Way Achieved*

– Zig Ziglar

# Goal Setting Worksheet

Employee Name:		Date:	
Department:		Job Title:	
Goal Period	From:	To:	

Key Strategic Objective/Department Objective

Goal #1	Action Plan	Time Frame/Due Date	Measure of Success

Key Strategic Objective/Department Objective

Goal #2	Action Plan	Time Frame/Due Date	Measure of Success

Key Strategic Objective/Department Objective

Goal #3	Action Plan	Time Frame/Due Date	Measure of Success



# My Learning

Your Guide To On-line Courses



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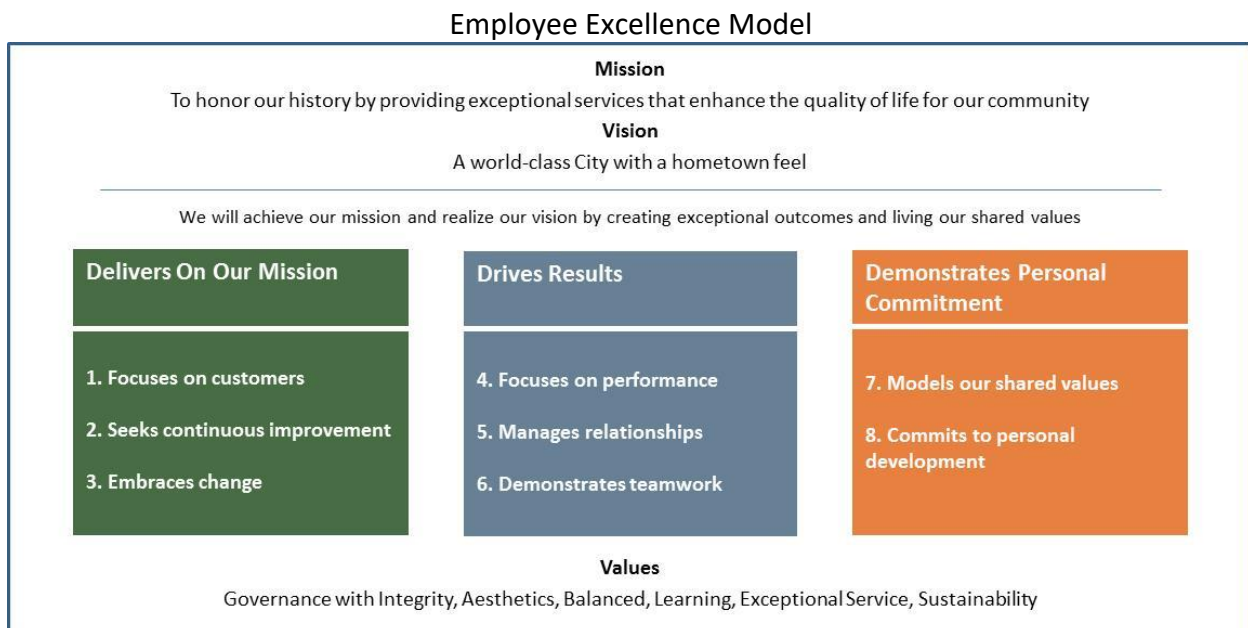
## Employee Excellence Model and Learning

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The Coral Gables Employee Excellence Model defines the critical competencies and behaviors necessary for success in the organization. This model applies to all employees regardless of role, department or level.

Embracing one common model:

- ☑ allows us to focus on building critical capabilities across the organization
- ☑ fosters a learning environment
- ☑ creates a common language for performance
- ☑ supports the development of skills necessary for improving individual effectiveness



To simplify your development, the Coral Gables on-line curriculum is organized around our Employee Excellence Model. Once you have completed your development conversation with your leader and created your development plan, you can use this guide to identify the on-line courses that will support your development and learning.

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# Using the My Learning On-line Portal

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## My Learning

**Welcome to My Learning**  
The City of Coral Gables is committed to your development. This easy to use site allows you to click, learn and grow with ease from virtually anywhere.

**My Tasks**  
1 Upcoming

**Quick Links**  
Learning Transcript  
Send Feedback  
Certifications  
Support  
Admin

**Upcoming Events**  
Live Events 3

**Featured Topics**  
CCNA Routing & Switching 100-101  
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Crucial Conversations  
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Digital Skills - MS Office  
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LAUNCH
- COURSE**  
**Building Career De...**  
Viewed: Aug 3, 2017 12:57 PM EDT  
LAUNCH

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# **On-line Course Catalog**

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## Delivers on the Mission

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### Focuses on Customers

Course Title	Course Description
<b>Interacting with Customers</b>	Failing to realize the importance of customer service and effective communication can lead to increasingly dissatisfied customers. This course provides valuable advice on how to improve your interactions with customers, including how to overcome barriers to communication as well as how to speak effectively, use vocal cues, and listen actively and use paraphrasing to convey your understanding of the customer's needs.
<b>Rapport Building in Customer Service</b>	Good customer service and strong customer relationships begin with building rapport. Building rapport requires knowing your customers, understanding their situations, and providing an empathetic ear for them to voice their concerns. In this course, you'll learn how to build rapport with customers by paying close attention to their needs, connecting with them, and being positive. You'll also learn how to empathize with customers by relating your own experiences, reflecting their emotions back to them, and normalizing their difficulties.
<b>Providing Telephone Customer Service</b>	When you're providing customer service over the phone, without face-to-face interaction, it can be challenging to establish the right relationship. There are many techniques that can help you consistently deliver the best customer service over the phone. In this course, you'll learn basic etiquette tips for answering, managing, and ending customer service calls. You'll also learn how to make a good impression by listening, using questions to probe for more information, minding your tone, and empathizing with the customer. Finally, you'll learn ways of reflecting or adapting to your customer's style.
<b>Facing Confrontation in Customer Service</b>	One of the most challenging and potentially uncomfortable responsibilities of a customer service person is dealing with angry customers. By following a few simple techniques, you can usually defuse tense situations without incident. In this course, you'll learn about typical trouble spots in dealing with angry customers and guidelines for avoiding or overcoming them. You'll also learn how to handle a customer complaint by defusing the tension, investigating the problem, and coming to an agreement on a solution.
<b>For People Leaders:</b>	
<b>Creating a Customer-focused Organization</b>	This Challenge Series exercise considers the many ways that business organizations can serve their customer internal and external.

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## Seeks Continuous Improvement

Course Title	Course Description
<b>Solving Problems: Framing the Problem</b>	Clearly articulating a problem requires asking the right people the right questions. Having all that information will make finding the root cause easier than if you tried to solve the problem in isolation. Framing the problem accurately requires finding out who affects and is impacted by the problem. It also requires identifying the reason(s) the problem exists. In this course, you'll learn how to identify stakeholders and effectively elicit their input. You'll find out how the causes of problems can lie at different levels of the organization, and you'll learn techniques to uncover the root cause.
<b>Solving Problems: Generating and Evaluating Alternatives</b>	Before generating alternative potential solutions to a problem, it's helpful to have a sense of the 'ideal state' – what the situation would look like if people had a magic wand. This provides some direction to those coming up with new ideas. After all, it's helpful to know if you're heading north or south before leaving your driveway, right? Once ideas and alternatives are on the table, evaluating which ones are the best to implement can be a daunting task. In this course, you'll first learn how to elicit descriptions of ideal states. Next, you'll find out how to use basic techniques for generating and evaluating alternative solutions to a problem. Finally, you'll learn to recognize and avoid common pitfalls that can occur while generating and evaluating alternatives.

## Embraces Change

Course Title	Course Description
<b>The Importance of Flexibility in the Workplace</b>	Change happens rapidly in business. As a result, employees must be flexible, adaptive, and ready for new things. This Business Impact examines how employees can develop these traits.

<b>For People Leaders:</b>	
Course Title	Course Description
<b>Implementing and Sustaining Change</b>	Change is hard. As a change leader, you'll bump up against resistance, doubt, discouragement, and apathy that can quickly erode any initial success. Understanding why change is so difficult for people gives you an edge for answering resistance, overcoming skills and information gaps, and moving the organization into a new way of thinking and behaving. In this course, you will learn how to tie the three keys to sustainable change – discomfort, vision, and skill – to the deployment of change in a manner that succeeds and lasts indefinitely in the future. Discover how to communicate, motivate, and monitor change in order to weave it permanently into the fabric of the organization.

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## Drives Results

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### Focuses on Performance

Course Title	Course Description
<b>Setting Goals</b>	Goals provide a roadmap for your performance and development, but setting goals requires you to consider more than your own objectives. You must keep your company's mission and vision in mind. This Challenge product explores setting appropriate goals. During this exercise, you will play the role of a research analyst for a consumer and market research firm.
<b>Aligning Goals and Priorities to Manage Time</b>	Meeting targets and achieving goals consistently regardless of the business situation isn't easy. A big part of doing this successfully is managing time effectively. In this course, you'll learn why it's important to align your goals with your company's goals, and you'll learn how to do it with a goal alignment worksheet. You'll also learn how to ask questions to clarify goals, and how to establish and prioritize priorities based on these goals.
<b>Preparing for Your Performance Appraisal</b>	Many employees find performance appraisals intimidating. This Business Impact shows how proper preparation makes the process less stressful and more beneficial.
<b>Receiving Feedback</b>	Receiving even well intended constructive feedback can be a difficult experience. There are biological foundations for this feeling, and it's easy to see why people often respond negatively. When receiving feedback, you should know how to manage your natural reactions so that you can effectively respond and engage with the feedback provider. Ideally, you will be able to use every piece of feedback as a tool in your long-term professional development.
<b>Be a Better Listener</b>	How well do you listen? Listening is rarely a hot topic in workplace training, yet the most successful people are almost always trained, excellent listeners. They have mastered a number of discrete skills and are capable of deploying this skillset creatively and adaptively to unique situations to ensure workplace excellence. In this course, you'll review the core of that skillset. You'll come to understand why you should focus on improving your ability to listen and debunk misperceptions surrounding the skill. And finally, you'll begin to explore the skills to hone your listening, including how to give yourself a pop-quiz at the end of a conversation.



<b>For People Leaders</b>	
<b>Course Title</b>	<b>Course Description</b>
<b>Planning an Effective Performance Appraisal</b>	Preparing for appraisals takes time, but the extra effort can transform a routine bureaucratic chore into a process that helps you, your employees, and your organization. In this course, you'll learn why performance appraisals are important. You'll be introduced to the elements that contribute to an employee performance plan. You'll also learn how to monitor ongoing performance, which will help prepare you for future employee appraisals.
<b>Managing Performance</b>	In order to best address performance of individuals and groups, managers must apply a comprehensive approach. This challenge focuses on methods for managing performance.
<b>Delivering Feedback</b>	Giving feedback doesn't have to be terrifying, but you do need to prepare. Get your motives, your purpose, and your plan in place before you open your mouth - and know what you'll do if it doesn't go well. In this course, you'll learn how to decide whether feedback is appropriate or not, where it's appropriate, and how to ensure it makes a positive contribution to the development of the individual, the team, and the organization as a whole. You'll also get some tips on how to handle situations where someone reacts badly to your feedback.
<b>Making Feedback a Regular Occurrence</b>	This course focuses on how you incorporate feedback into your routine and what you can do to promote a "feedback culture" wherever you are in the organization. Instead of viewing feedback as an isolated event (the annual performance review) or as a response to some specific problem or problem set, a better way is to view it as proactive teaching or coaching that occurs on an ongoing basis.
<b>Polishing your Feedback Skills</b>	Giving feedback is vital in the workplace. This course covers when and how to give feedback positively, how to handle bad reactions and your own nervousness, and how to give feedback to people at different organizational levels.
<b>Aligning Unit Goals and Imperatives</b>	Getting your priorities straight, no matter where you are in your organization, is about keeping a focus on your goals. It requires you to think about the bigger picture to ensure your department's work effectively supports the strategic objectives of your organization. In this course, you'll learn about the importance of setting strategic, tactical and operational goals. You'll also learn how to create effective unit goals and align them with company goals. Finally, you'll learn how to identify imperatives for action that keep you focused on meeting your objectives.
<b>Managing Goals</b>	Goal setting provides opportunity for both personal and professional development. This challenge focuses on creating effective goals for both managers and their employees.

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## Manages Relationships

Course Title	Course Description
<b>Cultivating Relationships with Your Peers</b>	Developing and maintaining relationships with your peers at work can lead to success for both you as an individual, and for your organization. A supportive peer network can provide you with a wide variety of expertise and institutional knowledge, and enable you to leverage other people's networks. This course explores how you can identify the peers in your organization who are especially important in meeting your goals and how to develop and maintain solid, mutually beneficial relationships with these people.
<b>Building Your Professional Network</b>	A key factor in advancing your career is using good communication skills to build strong professional relationships and maintain an effective business network of contacts. This course provides you with the essential communication skills required to establish a business network and includes strategies for building rapport with new contacts during networking opportunities. It also covers best practices for maintaining your network so that business contacts can help you achieve your career goals.
<b>Building Rapport with Your Boss</b>	Your boss can be the lifeline to your future. Typically, no one has more influence over your immediate and long-term success than the person to whom you report. Not only can you find enjoyment and reward in your current position, but your boss can be a source of support when you are ready to move ahead with your career. This course teaches strategies for building a strong professional relationship with your boss. It explains various ways you can become aligned with your boss -- even how to give your boss constructive feedback.
<b>Building Better Relationships through Understanding</b>	Solid working relationships are built when people understand and appreciate each other. This Challenge Series exercise explores the skills and practices needed to foster understanding in the workplace.
<b>Working Out and Through Conflict</b>	When you are dealing with workplace conflict, emotions get stirred up, and many people want conflict to 'go away.' But in most cases it won't go away on its own, so you need to choose a course of action. Sometimes it just means making peace with yourself or a situation. Other times, you may need to make trade-offs. If your choice is to deal with it straight on, you need a process. In this course, you'll learn how to work through conflicts smoothly by using a structured conflict resolution process. You'll also learn about techniques for getting the process back on track if difficulties arise.
<b>Difficult People: Strategies to Keep Everyone Working Together</b>	While it's best to get personally fit for dealing with difficult people -- that is, managing your own emotions and using self-management techniques, there are interpersonal strategies and skills you need when you engage and work with a difficult person. By learning how to focus on goals, give feedback, and manage conflict, you can work with difficult people more effectively.

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## Demonstrates Teamwork

Course Title	Course Description
<b>Being an Effective Team Member</b>	To make a real, positive difference on a team, you must take on the challenging task of putting the team first. This course covers strategies and techniques to help you become a more effective and valued member of your team. You'll explore ways to adopt a positive mindset and take a proactive role on a team, so that you can make a significant contribution. Because your success on a team depends on pulling together with other people, you'll also learn constructive ways to acknowledge differences and show respect for team members, and specific strategies for working collaboratively.
<b>Handling Team Conflict</b>	Successful teams are characterized by having a clear direction, trust among team members, effective communication, and the ability to quickly resolve conflict. The survival of a team depends on a team leader who can quickly recognize conflict, diagnose its cause, and use strategies to resolve the issue. In this course, you'll learn about what causes conflict on a team and the important role of healthy communication in handling conflict. You'll also learn about best practice approaches to resolving conflict and the tenets of principled negotiation. Finally, you'll learn guidelines for addressing one type of team conflict, lack of trust.
<b>Effective Team Communication</b>	It's vital to maintain open, effective communication on a team. However, it's all too easy to adopt bad habits. Without realizing how badly it affects your team, you or another team member may communicate in ways that lead to misunderstandings, cause unnecessary conflict, keep others from having their say, and prevent the team from performing as well as it could. In this course, you'll learn about different verbal barriers to effective team communication and strategies for overcoming them. But speaking is only one part of communication; effective listening is vital too. So you'll also learn about specific active listening techniques that can help you be a better listener.

<b>For People Leaders</b>	
Course Title	Course Description
<b>Building the Foundation for an Effective Team</b>	The way in which a team is built is an important factor in determining team success. Leading a team quickly and smoothly into high performance mode requires the groundwork of pulling the right team together, setting team goals, and defining the standards of team behavior. In this course, you'll learn about the five stages of team development and strategies for selecting high-performing team members most suited for your project or team. You'll also learn about laying the foundation for a successful team, including setting team goals, assigning roles to individual team members, and defining specific guidelines that outline how team members should behave to minimize conflict and optimize team performance.
<b>Developing a Successful Team</b>	Anyone who has worked in a project or team environment will tell you that team dynamics make a huge difference in the working environment.

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	Developing effective project teams is one of the primary responsibilities of a team leader. In this course, you'll learn how to develop the team culture early on by establishing team member competencies and working to improve team dynamics. You'll also learn about methods used to encourage team participation and motivation and increase team members' commitment. Finally, you'll learn about the importance of assessing and improving team performance.
<b>Building Trust Incrementally</b>	Trust in a manager is not a given. This Business Impact focuses on a new manager's challenge of winning the trust of her team.
<b>Inspiring Your Team</b>	This Business Impact explores the challenges leaders face when trying to find unique, appropriate, and effective methods to motivate team members to attain and surpass goals.
<b>Building and Leading Teams</b>	Leading a team requires facilitating effective interaction between team members. This Challenge examines the importance of maintaining team participation and commitment in order to overcome obstacles collectively.

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## Demonstrate Personal Commitment

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### Commit to Personal Development

Course Title	Course Description
<b>Disciplines of Organizational Learning: Personal Mastery</b>	The various models of organizational learning enable individuals or groups to systematically enhance abilities to produce a desired outcome. This Business Impact considers the benefits of one specific form of organizational learning: Personal Mastery.
<b>Developing a Plan to Further Your Career</b>	The whole notion of what a career is has changed. You are now responsible for making your own career choices, and it's not always clear which way offers the straightest path toward your goal. This course guides you through the process of taking inventory of your values, interests, skills, and needs. Then based on these findings, you can determine your strengths. This course also provides tips on how to deal with any weaknesses that are holding you back. You will also learn how to develop and implement your action plan to further your career.

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## Professional Development Series

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### Administrative Professional Series

Course Title	Course Description
<b>Developing Essential Skills</b>	As an administrative support professional, every task you complete successfully leaves a positive impression of not only yourself but of your manager – and often, of an entire team or department. The ability to support your manager and team effectively and professionally is essential to both your own and your manager's success. After taking this course, you'll be able to master standard administrative support skills that every administrative professional needs to perform on a regular basis. You'll learn about the classification systems used for sorting records, key tasks involved in arranging business travel -- including considerations for international travel, and the steps for planning and scheduling meetings, as well as the key techniques for recording meetings.
<b>Working in Partnership with your Boss</b>	As an administrative professional, you provide invaluable support to your boss and the business. This support is optimized when the working relationship between you and your boss is a true partnership. Within this partnership, your relationship must be managed and maintained according to the particular management style of your boss in order to ensure compatibility, dependability, and efficiency as you work toward common goals. Through partnership, you can maximize your relationship with your boss and realize benefits for yourself, as well as for your career. This course explores ways you can build a partnership with your boss. Specifically, it will teach you how to establish and maintain the elements of a true partnership, and shows how you can benefit personally from it. The course also covers approaches for you to deal effectively with different management styles, and techniques you can use to successfully handle confrontations that may occur over the course of your partnership with your boss.
<b>Working Effectively with Colleagues</b>	Regardless of the industry you work in or the boss you have, almost all the tasks you perform daily as an administrative support professional require interaction with others. Effectively interacting with others results in trust, improved morale, and respect between you and your colleagues, which in turn results in your ability to perform better in your role. In this course, you'll learn skills required of administrative support professionals to be able to interact effectively with others. Specifically, you will be introduced to the benefits of being a supportive colleague, including some best practices for doing so. You will also be introduced to techniques to use to ask for help from colleagues in a respectful and proactive way in order to accomplish your goals. Finally, you'll learn techniques to help you deal with criticism, including how to react to and act on it constructively.
<b>Projecting a Positive Professional Image</b>	There are many skills and competencies you must master as an administrative professional, from organizational skills to technical aptitude. In order to be truly successful, you must also master the ability to gain the trust, respect, and admiration of your boss and colleagues. At the same time, you need to remain true to yourself while expressing yourself to others, making decisions at work, or navigating through office politics. This course introduces best practices for making a good impression as an administrative professional. You'll learn how to project a positive professional image by building credibility. You'll also explore the importance of communicating honestly, respecting others, and having a positive outlook in order to create a positive work environment. Finally, you'll learn how to practice positive office politics.

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## First-time People Leader and Leadership Essentials Series

Course Title	Course Description
<b>The Reality of Being a First-time Leader</b>	Most new managers don't realize how much their new role differs from that of an individual contributor. Often, they have misconceptions about what managing entails, and they may be surprised to learn that the skills and methods required for success as an individual contributor and those needed for success as a manager are very different. This course describes some of the myths about management and their corresponding truths in order to clarify what managers really do. It also points to the typical demands and constraints of a manager's job. Finally, it describes strategies for dealing with common mistakes of first-time managers.
<b>Creating a Plan for Performance Management</b>	Having a performance management system in place can focus attention on results that count, boost productivity, align team and individual activities with organizational goals, and improve morale, all of which help ensure individual and team performance produce the desired outcomes for organizational success. In this course, you'll learn about the nature and benefits of performance management. The course outlines the five phases of a performance management system. It then explains how to recognize critical success factors and ensure effective key performance indicators, and explains the key components of developing role profiles.
<b>Managing Employee Development</b>	A key aspect of managing is developing your employees, which involves not only coordinating their work but also empowering them and providing opportunities for growth. This course details tactical strategies for developing your employees including assessing their development needs. Also covered are methods for creating a development plan with your employees based on their individual requirements, and ways to support the development plan by creating opportunities for practice and growth in skills and abilities. This course also introduces ways to continue supporting employees through follow up and monitoring, and ongoing and timely feedback.
<b>Managing a Multigenerational Workforce</b>	Many influences have shaped the lives and work experiences of various generations, namely, Baby Boomers, Generation X, Millennials, and Generation Z. Because each generation has its own distinct attitudes, priorities, and work habits, managers can get the best from each generation by using strategies that recognize the differences. In this course, you'll learn about the best practices and successful techniques for managing these generational employees in the workplace.
<b>Motivating Your Employees</b>	Motivation is what drives people to accomplish things. Without motivation, things simply would not get done. As a leader, your capacity for motivating plays a key element in the success of your organization. This course provides you with an understanding of why motivating strategies are important as a leader. It also provides you with practical techniques for encouraging motivation among employees in your organization.
<b>Establishing a Positive work Environment</b>	A positive workplace is paramount to your organization's long-term success. As a manager, you play a key role in establishing and maintaining good morale in your work environment, and noticing when negativity takes the place of positivity. As

	<p>a leader, you can foster a positive environment by communicating honestly, respecting and supporting others, and maintaining a good attitude. This course will introduce you to best practices for creating a positive work environment. You'll learn the benefits of establishing a positive environment, its characteristics, and concrete steps to create one. You'll also explore how to recognize the signs and impact of negativity, and how to take corrective action if necessary.</p>
<p><b>Effectively Directing and Delegating as a Manager</b></p>	<p>Understanding the essential responsibilities you have when directing and delegating to others, and the practices you should employ in order to meet those responsibilities, will lead to you fulfilling your duties and realizing the potential of your entire team. This course provides information on the key proficiencies of setting direction and establishing clear objectives and goals for your direct reports are explored. The importance of organizing, as well as communicating for clarity and direction, are discussed. This course also covers the best practices for planning delegation and the techniques you need to carry through with delegation. Finally, the course details the importance of monitoring delegated tasks to ensure employees are on the right track.</p>
<p><b>Trust Building through Effective Communication</b></p>	<p>Communication is most effective when you build and maintain the trust of the people you communicate with. In this course, you'll explore how a clear intention is the basis of an effective communication, and how understanding your audience ensures that the message gets delivered. You'll also learn how body language, vocal tone, and managing emotions can influence your communications and build trust with your audience.</p>

## On-Boarding

<p><b>Ensuring Onboarding Success</b></p>	<p>Managers are key to ensuring the success of employee onboarding programs. This course provides managers with an insight into their unique role and outlines the benefits they reap from properly onboarding new hires. It also covers the key elements of an effective onboarding program and explains how onboarding is different from traditional orientation. A successful onboarding program can increase employee acclimation and productivity as well as greatly decrease employee turnover, as new employees feel engaged and motivated in their new roles.</p>
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## Microsoft Office Skills

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### Microsoft Word

Course Title	Course Description
<b>Getting Started with Word 2010</b>	Word 2010 is the newest version of Microsoft's dynamic word processing tool and it offers features that allow you to create attractive and engaging documents. The Ribbon menu, which is unique to Microsoft Office, organizes Word's many features into related tabs and makes it easier to quickly access those you need. The new Backstage view provides a single streamlined 'stage' for all file-level tools, such as those used for saving, printing, and sharing your files. This course explores these topics and many other basics of using Word 2010, including opening the application, creating new documents, and an introduction to the many tools that will help you create and edit your documents.
<b>Formatting and Working with Text in Word 2010</b>	Word 2010 makes it easy to apply formatting to documents by providing a live visual preview of various formatting options. This allows you to view a variety of formatting changes before actually committing to them. This course explains the Font formatting options, as well as the Mini toolbar and Live Preview features. In addition, the creation and formatting of bulleted, numbered, and multilevel lists are demonstrated.
<b>Organizing and Arranging Text in Word 2010</b>	To create an attractive, coherent Word 2010 document, it's important to understand the application's basic paragraph-formatting features. This course explores formatting paragraphs in Word 2010, along with a variety of other useful formatting tools such as margins and indents. The course demonstrates how to set margins, paragraph indenting and alignment, tab stops, and how to show or hide formatting marks that can help guide your formatting decisions.
<b>Moving Around in Word 2010</b>	Word 2010 offers a variety of intuitive navigation features that help you move around and find your way through documents, whether they're a few pages or hundreds of pages long! This course explores basic navigation features such as scrollbars and keyboard keys, along with built-in tools such as the new Navigation Pane. This pane combines features of the Document Map, thumbnails, and Search features found in earlier versions of Word into one, easy-to-use interface. The course also demonstrates how to use Word's Full Screen Reading view to page through a file as if it were a printed document, and how to use Word's Outline view to organize your document.
<b>Structuring Word 2010 Documents</b>	Word 2010 provides many options for structuring your documents quickly and easily. This course demonstrates how to use headings to restructure the outline of a document using the Navigation Pane. If you're creating large documents with many pages, you might want to add page numbers to make your information easy to locate. The course explores how to add page numbers along with other structural components, such as page and sections breaks, headers, and footers.
<b>Reviewing Documents in Word 2010</b>	No one wants to be embarrassed by glaring grammatical mistakes and misspellings in a document. To help you catch these errors, Word 2010 includes editing tools that enable you to spot and fix your typos as you work. It also enables you to use other proofing features such as a thesaurus, research options,

	<p>and word count statistics to help you proof your work. In addition, you can make changes while reviewing your work using a feature that tracks all of your edits, and you can also leave comments during your review. This course explores all of these proofing features, from spelling and grammar correction to tracking changes. The course also demonstrates how to use the Help feature in Word 2010.</p>
<p><b>Saving, Sharing, and Printing in Word 2010</b></p>	<p>Once you've created an attractive, well-structured document, how do you save it for future use? Word 2010 enables you to save your documents in many formats, including the standard .docx file extension, along with the well-recognized .doc extension. You can also save your documents as PDF or XPS files to make them uneditable and give them standardized appearances for sharing. In addition, you can choose to save and send your document using e-mail, Microsoft SkyDrive, upload your document as a blog post, or save it on SharePoint. If you want to print your document, you can use Word 2010's new streamlined Print interface which presents print options, such as orientation and duplex printing, on the same page as a preview of your document. This course explores Word 2010's features for saving and printing your documents.</p>
<p><b>Customizing the Behavior and Appearance of Word 2010</b></p>	<p>Word 2010 enables you to efficiently create attractive and organized documents using a variety of automated and pre-built features. You can quickly and easily use any of the Word 2010 styles to give your document a polished appearance, or you can create your own styles so you can use a custom appearance over and over. In addition, Word 2010 enables you to create documents using pre-built templates that are bundled with Word, saving you time and effort in choosing a layout and color scheme for your files. This course introduces Quick Styles and templates, and also explores an editing feature – AutoCorrect – that automatically corrects common errors such as not capitalizing the first letter of a sentence, or accidental usage of the Caps Lock key. The course also demonstrates how you can customize the Ribbon.</p>
<p><b>Drawing and Inserting Graphics in Word 2010</b></p>	<p>We all know that to create an effective Word document, your text must be clear and organized, but we sometimes neglect the overall attractiveness of our documents. This course demonstrates powerful drawing and graphic features of Word 2010 - features that can boost the appeal of virtually any document! The course focuses on the processes and tools that allow you to add pictures, Clip Art, screenshots, and SmartArt to your documents. It also explores drawing components such as shapes, WordArt, and text boxes.</p>

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## Microsoft Excel

Course Title	Course Description
<b>Getting Started with Excel 2010</b>	Excel 2010 is the newest version of Microsoft's comprehensive spreadsheet tool that offers features that support a wide range of functions. The Ribbon menu is unique to Microsoft Office and stacks the many features of Excel into related tabs, making it easy to quickly access the ones you need. Backstage view is a streamlined gathering of all file-level tools, such as those used for saving, printing, and sharing your files. This course explores these topics and many other basics of Excel 2010, including opening the application, creating new spreadsheets, entering data and, AutoFill features. It also provides an introduction to the many tools that will help you create and use your spreadsheets productively.
<b>Applying Basic Data Formatting in Excel 2010</b>	Excel 2010 provides a number of tools and features that allow you to visually enhance the appearance of worksheets and workbooks. Data and cells can be manipulated and customized using various positioning and formatting features. This course explores the processing of formatting cells and text, using tools such as the format painter and changing the way text is presented in order for it to be more visually appealing. This course also explains the various options for formatting numbers in Excel 2010.
<b>Moving and Getting Around in Excel 2010</b>	While it can look complicated and daunting, navigating the Excel interface isn't as difficult as it first appears. This course will show you how to move around the Excel interface using the various keys on the keyboard, such as the Home and End keys, and Ribbon commands. The course also covers the ways in which you can view and arrange workbooks and worksheets to be the most useful and shows you how you can access Excel's many Help features.
<b>Moving Data and Modifying Worksheets in Excel 2010</b>	The ability to easily manipulate data is probably the biggest benefit of using productivity applications, such as Excel 2010. For instance, if you have to copy the same data multiple times or move large amounts of data from one place to another within a worksheet or between workbooks, you can see this is much more easily accomplished through software than through the use of pen and paper. For example, Excel 2010 features such as Live Preview let you see how copied data will look before you copy it, even if it's copied between Office applications, and the Paste Special option allows you to further define how your data is copied or moved. This course is designed to show you many of the ways that Excel 2010 allows you to manipulate data and the worksheets that contain them and describes features that let you do this quickly and efficiently.
<b>Saving, Sending, and Printing Excel 2010 Workbooks</b>	Excel 2010 makes it easy for you to save, print, and share workbooks and worksheets. When you create an Excel workbook, you will most likely want to save it, and in many instances, print it to save a hard copy or share with someone else. New features of Excel 2010 also

	allow you to easily collaborate with others by using the Sharing option in Backstage view. All of these options – saving, printing, and sharing – are grouped together on the File tab for convenience. This course describes these Excel features and explains how to use them to increase your efficiency and productivity.
<b>Using Conditional Formatting, Tables, and Sparklines in Excel 2010</b>	Excel 2010 provides tools that enable you to efficiently present your data and that can also make your data easier to understand. Tables can be used to logically present data in an easy to read fashion and table styles provide a way to make your workbooks more attractive and professional looking. Conditional formatting allows you to highlight trends and exceptions in cells or ranges of cells by presenting the identified data in a number of unique ways to make it stand out. Sparklines, a new feature of Excel 2010 are small charts within a cell that provide a visual representation of data and can be used to show trends in an appealing manner. These features – tables, styles, conditional formatting, and sparklines – how to access them and how to use them, are covered in this course.
<b>Reviewing and Protecting Content in Excel 2010</b>	Excel 2010 provides easy to use and access tools that allow you to review, proof, and protect the workbooks you create and share. The tools for performing these tasks are grouped conveniently on the Ribbon and include the Spelling, Research, and Thesaurus tools; a Translate tool; tools to insert, edit, and review Comments in a worksheet; and tools for tracking changes and protecting workbooks. The various tasks you can perform with these features are covered in this course, along with how and when you would use these tools.
<b>Using Basic Formulas in Excel 2010</b>	Excel 2010 provides you with the tools that allow you to perform calculations on your workbook data. Being able to use formulas to do complicated calculations not only simplifies your work but also helps to reduce the number of errors that can arise in such complex tasks. This course introduces the concepts and terminology associated with formulas, and demonstrates how to create and edit them, copy and paste them, and how to check for errors that can arise.
<b>Using Basic Functions with Excel 2010</b>	One of the great features of Excel 2010 is its ability to perform a wide variety of functions to make your use of Excel 2010 easier and more fun. Functions are inbuilt formulas that save you time by allowing you to choose one that suits your needs rather than having to create a complex formula from scratch. This course introduces you to the changes made to functions in Excel 2010, including improved function accuracy and consistency as well as the changes made to some function names that make them more intuitive. It describes the useful feature of Excel's status bar that automatically displays basic calculations as well as the Function Library, which groups useful functions. The most common use of functions, calculating basic financial, logical, date and time data is also covered.
<b>Inserting Basic Charts in Excel 2010</b>	Using the charts feature in Excel 2010, you can create attractive and well-organized representations of worksheet and workbook data. Charts can be easily inserted and customized from the Charts group on

	the Insert tab of the Ribbon. This course demonstrates how to effectively use and customize charts in Excel 2010; it explores available chart types and the best use of each type; and shows how to change the different elements of a chart to provide an effective visualization of your data.
<b>Adding Visuals, Themes, and Styles to Excel 2010 Workbooks</b>	Excel has more than just charts to offer in the way of visual presentation. Nonchart-related graphic tools such as Shapes, SmartArt, WordArt, ClipArt, and Screenshots are all ways to enhance the visual impact of documents that tend to be dominated by dry numbers and text. This course focuses on these and other graphic elements that can be added to Excel 2010 spreadsheets. This course also introduces ways to change the themes and styles offered by Excel 2010.

## Microsoft PowerPoint

Course Title	Course Description
<b>Getting Started with PowerPoint 2010</b>	PowerPoint 2010 is a presentation program that allows you to create professional-looking slide-show presentations. This course provides an introduction to the main components of the PowerPoint 2010 interface. It covers opening and saving a presentation, working with slides, formatting text and text boxes, and using templates and themes to create professional looking presentations.
<b>Visually Enhancing PowerPoint 2010 Presentations</b>	PowerPoint 2010 enables you to create visually appealing presentations through the use of graphics. Adding simple enhancements through the use of themes, tables, charts, and SmartArt allows you to create more engaging and interesting presentations. This course introduces the various themes and SmartArt features that allow you to add flair to your presentations by using colors and shapes to emphasize text and data. Also covered are the various ways of incorporating diagrams, tables, and charts to create a professional and effective presentation.
<b>Adding Images to Presentations in PowerPoint 2010</b>	Inserting images, such as photographs, clip art, and shapes, into your PowerPoint 2010 presentation can help to capture and keep the attention of your audience. This course will show you how to insert, format, and apply special effects to your images so that they provide the maximum impact for your presentation. You will learn how to create a photo album and create a presentation that effectively displays your favorite photos. In addition, you will be shown how to use the new built-in screen capture tool that enables you to capture and embed screenshots of other programs into your slides.
<b>Using Multimedia and Animations in PowerPoint 2010</b>	PowerPoint 2010 can help you make presentations more dynamic by adding audio and video clips to any slide. You can directly insert, edit, and play video in your presentation, as well as add audio clips to create attention-grabbing sound effects. PowerPoint 2010 also has new animation tools and slide transitions which make slide shows more fluid and interesting. All of these features are discussed in this course.



**Leadership Development Program**  
***GSR Specialist In-Training Checklist***

- 1) **“Lead by example”** – Show you are a leader! The GSR Specialist must keep their skills and knowledge of all policies & procedures at 110% at all times.
- 2) **“Must earn respect of staff”** – As a leader the GSR Specialist will not be effective without the respect of staff.
- 3) **“Must establish working relationships with others”** – Interpret and understand orders. If a specific order is given and you do not understand, respectfully discuss in private. Do not second guess other staff or superiors (*especially in front of staff and guests*).
- 4) **“Complete paperwork”** – Checklists, temperature logs, inventory/order forms, waste logs, catering sheets, cost analysis & cost control reports must be completed periodically.
- 5) **“Rotation”** – Learn to set up an effective break and work flow rotation and use staff wisely.
- 6) **“Delegate duties”** – Assign tasks to staff members to operate the facility effectively. There is ALWAYS something to do. If not then it’s time to send staff home!!!
- 7) **“Correcting staff”** – Provide constructive criticism and positive reinforcement.
- 8) **“Motivation”** – Learn how to motivate your staff to do better and enjoy their job.
- 9) **“Enforce rules and regulations”** – Learn to enforce all rules and regulations calmly and promptly. Watch for infractions and deviations of Standard Operating Procedures.
- 10) **“Customer service”** – Must be able to speak with guests and handle situations that may arise. Use L.A.S.T. when handling guests – Listen, Apologize, Solve, and Thank. If the situation is too big, then try to ask for help from your direct Supervisor.
- 11) **“Concession & Admission supervision”** – Must be visible and available to staff while on duty.

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**Leadership Development Program**  
***Lifeguard III (in training) Checklist***

- 1) **“Lead by example”** – Show you are a leader. Must keep skills and knowledge of protocol at 110% at all times. Must be accurate.
- 2) **“Must earn respect of staff”** – Lifeguard III will not be effective without respect of staff.
- 3) **“Must establish working relationships with others”** – Interpret and understand orders. If a specific order is given and you do not understand, respectfully discuss in private. Do not second guess other Lifeguard III’s or superiors (*especially in front of staff and guests*).
- 4) **“Complete paperwork”** – Checklists, chemical checks, accident/incident rescue reports must be completed.
- 5) **“Lead in-service training”** – Train lifeguards in all aspects of lifeguarding and keep track of in-service hours.
- 6) **“Rotation”** – learn to set up an effective rotation and use staff wisely.
- 7) **“Correct Lifeguards”** – Provide constructive criticism and positive reinforcement.
- 8) **“Vigilance Awareness Training (V.A.T.) and Audits”** – Perform testing on lifeguard skills and constructively critique and praise. Be able to assist the lifeguard to improve on skills.
- 9) **“Motivation”** – learn how to motivate lifeguards to do better in their job.
- 10) **“Enforce rules and regulations”** – learn to enforce rules and regulations calmly and promptly, must always watch for infractions and deviation of Standard Operating Procedures (S.O.P.).
- 11) **“Customer Service”** – Must be able to speak with guests and handle situations that may arise. Use L.A.S.T. when handling guests – Listen, Apologize, Solve, and Thank. If the situation is too big, then try to ask for help from others.

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