

# Succession Planning for Workforce Partnerships: *A Toolkit for Practitioners*



 **CWC Commonwealth Workforce Coalition**  
A Network of Massachusetts Community-Based Workforce Development Practitioners

**SkillWorks**<sup>SM</sup>  
PARTNERS FOR A PRODUCTIVE WORKFORCE

  
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United Way  
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*SkillWorks*: Partners for a Productive Workforce is a multiyear initiative jointly supported by 18 public and private funders to improve workforce development in Boston and in the Commonwealth of Massachusetts. *SkillWorks* brings together philanthropy, government, community organizations, post-secondary education institutions, and employers to address the twin goals of helping low income individuals attain family supporting jobs and businesses find skilled workers. *SkillWorks* invests in three areas of work to accomplish its mission: Workforce Partnerships, Public Policy Advocacy and Capacity Building. *SkillWorks* has become a model for cities across the country and for the National Fund for Workforce Solutions.

For more information on SkillWorks, please visit our website at [www.skill-works.org](http://www.skill-works.org).

*SkillWorks* acknowledges the time and input we received in producing this Succession Planning Toolkit. In particular, we owe a debt of gratitude to Patricia Duarte, who generously allowed us to reproduce her presentation to the *SkillWorks* project directors and many of her materials in this publication.

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# Succession Planning for Sector Projects

Sarah Griffen

Staff turnover is almost inevitable for any organization or project. Yet, perhaps because we don't want it to happen or to believe it will happen, many organizations devote little or no time to planning for staff turnover. In workforce development sector projects, where relationships span organizations, employers, funders, and other partners, creating tools and processes that enable strong project continuity are critical.

This briefing paper captures the content and discussion of a mini-training by Patricia Duarte for the Skill Works Project Directors in September 2011 and is followed by a series of tools geared to help projects plan for succession and turnover.



**The largest loss, particularly for a sector based project with multiple partners, is the loss in relationship.**

## Challenges in Succession Planning

Staff transition is challenging wherever it happens within an organization. Staff have usually created systems for managing information and maintaining contact with key stakeholders. While organizations can create templates and general systems for staff to utilize, the reality is that people are productive differently and capture things differently. Often it is only when a staff announces that they are leaving that others within a project work to understand how the departing staff person manages data and relationships – at the very time when that person may need to devote time to closing out pieces of their work.

The largest loss, particularly for a sector based project with multiple partners, is the loss in relationships. Incoming managers need to pick up relationships with employers and employer staff, and it can take significant time to re-knit an institutional relationship if there has been no planning to facilitate the transition. The loss is even more profound for coaching staff because the relationship between the participant and coach is intense, personal, and has been built over time.

## Strategies

Fortunately, there are tools and processes that can be put in place before staff announce they are leaving. Organizations can develop and utilize systems that layer staff throughout the project in strategic ways to facilitate eventual transitions and create a culture of expectation about how work is documented. For individual staff transitions, organizations can learn from Public/Private Ventures workforce training manuals<sup>1</sup> that “retention begins at intake.” The same philosophy can be applied to succession planning – successful succession planning for when a staff person will eventually leave begins the first day that staff person enters the organization.

<sup>1</sup> “Retention Essentials Manual,” Public/Private Ventures, [www.ppv.org](http://www.ppv.org)

## Organizational Processes and Systems

Managers focusing on succession planning should think about both the explicit content areas that each staff member oversees and about how that work gets done. The first – the explicit content areas – can be managed through information systems and other tools. The second – the “how” – may be less clear but are just as critical in any transition. Top-performing staff who have created relationships and managed projects well often have a particular approach or personality that is difficult to duplicate; paying attention to how they work can help ease transitions.

### ***Take a team approach to providing services to employers.***

Workforce partnerships might take a cue from sales teams in retail or other industries. In order to mitigate often high turnover within this occupation, sales teams assign a lead representative for each client and also have a supporting team that knows the client. Using a similar approach within a workforce partnership can help maintain institutional knowledge of an employer or of participants. Teams can operate in the background, with the lead providing regular briefings and updates and facilitating discussions about the employer, services, and program at internal meetings. Team members can occasionally meet with the employer or a participant to ensure relationship continuity face-to-face.



**Take a cue from sales teams: Assign a lead representative for each client and have a supporting team that knows the client.**

### ***Maintain a robust data system.***

Using a robust database to track participant and employer information helps to maintain information in one place. Popular tools for sector projects include Efforts to Outcomes and Salesforce, but there are many others which can be customized. Ensuring that the database is updated weekly, or on a regular schedule that works for the organization, helps to embed the importance of current data and prepares the organization for sudden transitions. Partnerships should also consider the use of a team approach in this area to ensure that database expertise is not embedded in one person alone. The lead agency for the partnership should develop, regularly review and update, and keep in a central location policies for data entry, ensuring data quality, and the use and review of data.

### ***Create a job manual.***

Underlying the relationships within sector projects is a wealth of information that is critical to the success of both the relationships and the project. Creating a job manual for each staff person that is not only used for succession planning but also as a tool for use by the current staff, helps to catalogue critical information in one place. The job manual might include detailed profiles on each employer that comprise: 1) contact information for key employer staff; 2) preferred methods of contact; 3) details on employer’s relationship with the project (good and challenging experiences); 4) information on how the relationship was established, and the method for establishing new relationships; and 5) critical dates or time frames related to the employer’s operations.

A job manual goes beyond a simple job description by providing detail on the critical parts of each person’s job including data management processes, regular meetings, reporting responsibilities, coaching templates and processes. Finally, all the background and more informal knowledge should be captured - “here’s what you really need to know about this person, employer, or client.” Part of each staff person’s job is to review and update the job manual regularly; this helps it to become a resource for the staff person updating it and helps to ensure it will be up-to-date for the next staff person in or for a back-up person. One idea is to make updating the job manual part of the organization’s annual performance review process, if applicable.

### ***Create regular cross-learning about the entire sector project, each person's role, and the ongoing activities.***

This approach aids in creating broader organizational knowledge that will sustain the project during times of transition. Staff meetings might provide opportunities for different teams (coaching, job development, instruction, employer engagement, fund raising/administration, etc.) to present their work, receive feedback and engage in cross-departmental learning.

### ***Examine the physical organization of staff.***

Being conscious of the flow of participants and creating ways for participants to informally meet and see other staff creates more of a team sense. For example, Year Up's coaches are situated in a cubicle area so that when participants come in, they have the opportunity to get to know more than one staff. At the employer site, having a space in which to work, or a bulletin board where partnership staff pictures and contact information are present, builds organizational presence.



**Changing the organizational frame towards one of sharing relationships rather than having exclusive one-on-one relationships can increase program effectiveness in the long term.**

## **Human Capital Strategies**

### ***Identify your top performers.***

Understanding why your top performers excel can help managers to improve the overall quality of staff within an organization. Managers should take time to understand the qualities and practices of their most effective staff, with feedback from employers and other partnership members. When there is turnover, managers can then use that information to hire and onboard new staff. Additionally, asking top performers to help with training and coaching others can facilitate building their effectiveness into other staff's approaches and work. Areas of coaching can include technical skills, relationship management, project management, and instructional design and delivery.

### ***Use staffing transitions to embed succession processes in the paradigm of operations.***

It is sometimes difficult to step back and create a whole new system of succession planning. Instead, use moments of transition as opportunities to move the overall organizational culture towards one that encourages deliberate succession planning. Each new hire should understand that part of their core responsibility is to bring other staff into their work. During on-boarding, managers can make clear that sharing information and communicating with other coaches about clients, for example, is simply part of the job, and that it is standard operating practice for each client to know more than one coach, even if one staff serves as the primary coach.

### ***Establish a culture where relationship sharing is part of doing business.***

Given that turnover is inevitable, establishing a culture where the sharing of relationships is a part of how a project "does business" aids in program continuity. For immediate efficiency purposes, program staff often have individual relationships – one coach works with one participant, or has the relationship with an employer's staffing manager. In the long term, as turnover occurs, this staffing pattern translates into lower effectiveness because of the break in relationship continuity. Changing the organizational frame towards one of sharing relationships rather than having exclusive one-on-one relationships can increase program effectiveness in the long term. Because this change fundamentally restructures how staff operate, including staff in discussions and decisions on how to effect this change for staff, participants, and employers helps build buy-in and increase the likelihood that this organizational change will happen smoothly and effectively.

Staff can also be encouraged to promote this same team concept when talking with participants. Helping them to see that their role operates within a larger organization and then translating that to external stakeholders – participants and others – helps to build an organizational identity that moves beyond any one individual. Rather than identifying as “the coach,” staff can early on talk about the entire project team, introduce one or two other staff who are on their team, and help the participant to see the broader organization supporting their goals.

***Utilize strategies to promote buy-in and embed succession thinking in staff’s daily approach.***

- **Discuss the benefits of a team-based approach.** A team approach can minimize stress during times of intense work at a particular employer, because others are ready to be tapped to add extra staffing capacity. Vacations and sick time are also easier because other staff are fully briefed and ready to support the work at a particular employer or in coaching clients during those periods.
- **Promote long-term thinking.** Building in an approach to everyone’s job that part of their responsibility is in preparing others to do their job sets expectations that succession processes are part of everyday work. Creating a discipline about updating files and maintaining team information on employers or clients ensures that when turnover does happen the organization is prepared.
- **Make a practice of thinking about the “what ifs?” and be prepared for them.** What if they are out sick with the flu for two weeks? What if someone has to leave their job suddenly? How will we cover maternity leave or other leaves of absence? Those questions can help guide staff to think about how to sustain everything they are doing, and then embed processes in their daily practices.



**“Successplanning” – for the staff themselves – helps them to see that to succeed in their current job they need to plan for their future and the future of the particular position they hold.**

***Use staff career development to promote succession planning.***

Discussions with staff about their own skill and career development can be used as times to also help staff understand why a part of their current job is preparing the way for someone else to take their place. “Success planning” – for the staff themselves – helps them to see that to succeed in their current job they need to plan for their future and the future of the particular position they hold.

## Employer Relationships

Employer relationships and services are the backbone of any sector project. Losing or lessening those relationships during a transition can jeopardize operations and outcomes. Successful sector partnerships will include employers in thinking through how to provide the right staffing support to maintain these connections, even as transitions occur.

***Help employers to see the value-add of a team approach.***

Employers recognize that turnover occur and will likely value an up-front discussion that shows organizational maturity in planning for the future and attention to quality customer service. Using the sales analogy noted above, having a discussion with employers about how to staff them both for the present and in the case of transition will ease the transition when it does occur. Frame the other coach/staff as a “back-up person or back-up team” for vacations, times when there is intense work, etc. – as an added service to the employers that will ensure consistency of support and service. This can help manage the tension that employers don’t like working with multiple people from the same organization.

### ***Talk with the employer about explicit roles on the team.***

“I’m the employment coordinator; you will have me as the primary contact; I’ll also have a back-up person so our operations are seamless for you and so there is someone to step in if I’m on vacation, sick, or otherwise not present.”

### ***Create a template that asks very specific questions of employers to facilitate transparency in planning.***

Optimally, asking the employers to provide input on the template will help to build buy-in to the process and may add critical information that is not obvious to the sector project.

### ***Visit the employer regularly and become part of their culture.***

Do this in teams to help staff prepare to step in, if needed.

### ***Use regular feedback meetings to understand from an employer’s perspective how the relationship is working.***

Document the feedback to improve the project and provide an incoming person with current information on how the relationship is going from the employer’s perspective.

### ***For new staff, meet with employer partners early on.***

These introductory meetings, especially when new staff can enter such a meeting fully briefed by the tools and processes discussed here, provide an excellent opportunity to hear from an employer perspective how the relationship has evolved, their expectations, and other key information that will more quickly build the trust of the employer in the new relationship.



Once a more team-based approach is established with the employer, it will be important to bring the team to occasional meetings with the employer so that there is some face-to-face contact and so that the entire team is familiar with the employer’s organizational approach and culture. In addition the team should have regular opportunities to meet and develop common thinking and approaches.

## **Taking the First Step**

Most sector projects do not have many of the tools and processes in this paper embedded in their organizations. Developing a full-blown succession planning strategy takes time and effort, and can easily become one of those projects that will be undertaken when there is time. Yet taken as individual strands of work, beginning to embed succession planning in organizational cultures and systems can start quickly. Key to beginning the work is the consciousness of what an organization is trying to do, and small, continued, and repeated emphases on why succession planning is important and why a particular strategy, process, or system will better prepare organizations for transitions. And then, when a staff transition does occur, as it will, staff will begin to see the value of the emerging organizational changes as new transitions becomes easier to manage.

*Following this paper, we have included a few tools to help organizations and partnerships take some of those steps.*

# SkillWorks Management Workshop

## Staff Transition Management Success-ion Planning for Retention & Sustainability

September 23, 2011



***Presented by***

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# Non-Profit Turnover

Source: Opportunity Knocks NonProfit Retention and Vacancy Report, 2010



Average turnover for NPOs *decreased* since 2008 (*from 21% to 16%*)

- 20% vacated after < 1 year (*majority after 1 – 2 years*)
- 50% of Program & Direct Service Managers vacated after < 2 years
- Highest turnover in Arts, Culture & Humanities, Health Care, Youth Development and Human Services
- Education Services turnover rate: ~6%
- Top 3 Reasons: 1) Layoffs & Involuntary Termination 2) Competitive Job Offer 3) Job Dissatisfaction
- In 2010, small NPO's (budgets < \$1M) had more turnover than large NPOs (>\$5M)

## What's YOUR ORGANIZATION'S Turnover Rate?

*(divide # of Terms by total # of Staff)*

$$\frac{\text{Total \# of Terminations (Voluntary + Involuntary)}}{\text{Total \# of Staff employed}}$$

## Economic Factors of Tough Economy

- Cost of Turnover = 3 X Salary + Benefits
- Demand for services (in most NPOs) increases
- Voluntary turnover is low...
- Unhappy and/or "marginal" performers don't leave
- High demand jobs hard to fill: Admins; Development & Program Mgrs\*.
- As the Economy improves expect Turnover to increase

**Biggest Competitor for NPO Talent are other NPOs\*!**

## Prevention & Planning Strategies



### Assess Your Hiring Process and Success Rate

*Are you attracting good Candidates? How are things after 1<sup>st</sup> year in job?  
Evaluate your Interview and Hiring process - survey new hires!  
How's your Onboarding and new hire Orientation / Training process?  
Are your salaries and benefits competitive?  
Monitor engagement and staff satisfaction. Get input and feedback  
Conduct exit interviews. Use the information for positive change  
Structure exit transitions for effective transfer of information*

### Workforce Planning – Plan according to current Turnover Rate

*Build a pipeline for inevitable vacancies using “soft” recruiting techniques  
Value potential candidates as you do potential donors  
Use social media to engage potential candidates - always promote your org  
Implement succession planning for all job groups and levels  
Strengthen termination / exit processes to ensure IC is transferred*

### Assess Org Culture – Does it align with Mission and Values?

*Adopt and communicate a zero-tolerance policy for workplace bullying  
Address behaviors that impact positive, productive energy and desired results  
Deal with performance management issues timely – resolve lasting problems  
Create a great work environment for all – get input  
Ensure staff have the tools and resources they need for success*

### Keep Morale High – Communication, Development, Fun

*Share information that impact the Org and/or the Mission  
Prevent burnout – adjust job duties, role or hours to mix it up, as necessary  
DRIVE professional and career development  
Develop mentoring programs – tap resources inside and outside the org  
Allow staff to try new things in the job or the organization – great for x-training!  
Small surprises are fun for staff – free pizza lunch; ice cream break; happy hour?*

# Success-ion Planning

## Mitigate Impact of Turnover...



### **New Hire Message –**

“Prepare Your Successor starting Day 1”

Focus: Development, X-Training,  
Relationship Management

Identify high potential and senior staff for leadership and management

Identify “mission critical” jobs and staff . Identify successor(s) and plans for each

Mutually determine succession and career plans for every staff member

Develop / strengthen internal training, peer learning, sharing.

Keep process and important contact information update to date.

Use career / professional assessment tools with all Staff to assess skills, competencies, interests, motivations. Use to target development and succession plans.

Encourage transparency with external relationships. Use web-based tools for information sharing and documentation.

Maintain active networks for potential candidates to meet future hiring needs.

Understand trends that will impact clients, services, funders, regulations, Job requirements, internal activities and costs.

Develop individual and team work plans that include fluid information sharing and documentation... use web – based tools, less paper... (cloud!)

Understand your labor market demographics, trends workforce readiness, training needs and talent resources.

Revise onboarding and training plans to support success-ion planning.

# Success-ion Planning Process



## Role of Managers and Supervisors:

1. **Vision: Succession Planning drives Career Development**
2. **Plan: SMART Development Goals + Defined Competencies**
3. **Execute: Implement, Monitor and Evaluate**
4. **Celebrate Success**

## Resources...

### Succession Planning Tools and Tips



#### Easy Visioning Activity for Defining Goals....

Ask “1 year from now what is the desired state, change or outcome?”  
What resources, knowledge and behaviors support the desired state?

Develop 1 - 6 “SMART” Goals to get there.

*Specific, Measurable, Attainable, Relevant, Time specific*

See sample planning tool

\*\*\*\*\*

#### Identify Technical and Behavioral Competencies

Update job description with required skills, training, knowledge, networks etc.

Identify the “soft skills” (competencies) that are required

Use the Decision Insight Card Deck or List of defined Competencies to identify the top skills needed. Use for position descriptions, professional development coaching and evaluation.

For PDF contact [pduarte@decisioninsightinc.com](mailto:pduarte@decisioninsightinc.com)

Use online Competency Assessment tools...

Example: Profiles™ [www.profilesinternational.com](http://www.profilesinternational.com)

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#### Google docs

##### Customer relationship management (CRM)

Example DonorPro <http://www.towercare.com/>

*DonorPro effectively brings together fundraising, constituent management, donation tracking, and workflow management in one extremely user-friendly package.*

## Decision Insight, Inc.

### *Organizational Development, HRM & Executive Search*



#### *Patricia Duarte, Principal*

Former HR Manager, Cray Research Inc, Eagan, Minnesota; HR Director, Silicon Graphics, Inc, Mountain View, California; HR Vice President, eBusiness Technologies, Providence, Rhode Island, HR Dir /VP Network World, Southboro, MA. Former Board Director of high tech start up venture in Toronto, Canada. Graduate of the University of Cincinnati, College of Arts and Science. Earned numerous certifications in HR management, change process design, facilitation, survey research methods, organizational and individual assessment.

Founded Decision Insight, Inc. in 2003. In 2006, Patricia joined the Organizational & Executive Transitions Program at Third Sector New England and a select pool of independent OD consultants providing capacity building services to nonprofits throughout New England. Her work and reputation with TSNE clients led to the expansion of her broader practice to schools, universities, state funded agencies and municipalities. Decision Insight, Inc. works with for-profit and nonprofit corporations in New England and selectively beyond.

Decision Insight is based in Hopkinton, MA where Patricia Duarte has lived with her family for nearly 15 years. In Hopkinton, Patricia serves on the Town's Personnel Board and is the volunteer Director of the Hopkinton Community Education Program.

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# Staff Succession Planning Worksheet

GOALS	ACTION STEPS / ACTIVITIES	WHAT DO I NEED?	FROM WHOM?	TIMELINE/ DEADLINE	SUCCESS FACTORS / MEASURES
<p><b>Example</b> Share / Strengthen Relationship (who?) with (whom?)</p> <p>Retain relationship between projects</p> <p>Source web-based tools or develop in-house methods of sharing information and documenting activities with each aspect of our work and relationships</p> <p><i>Each Staff member has a page with unique or similar goals...</i></p>	<p><b>List...</b> <i>What changes or actions or steps will be taken to achieve this goal?</i></p> <p><i>Brainstorm ideas - get creative.</i></p> <p><i>Source tools, ask around, talk to vendors</i></p> <p><i>Review in-house solutions... use free technology resources</i></p>	<p><i>What information, preparation training, coaching or mentoring is needed?</i></p> <p><i>Develop proposals that outline benefits and costs</i></p>		<p><i>Determine the timeline or dates for key actions</i></p>	<p><i>What will be the indicators and evidence of success?</i></p> <p><i>Aim for partial if not complete success... one deliberate step at a time – but stay focused on the Goal!</i></p>
<p><b>**Sample Planning Form for ecopy contact pduarte@decisioninsightinc.com</b></p>					





## **Your Needs**

*What do you Need to Achieve Desired Results and Satisfaction?*

**✓ Your Staff**

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**✓ Your Supervisor**

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**✓ Yourself (personal / professional development)**

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# Leadership Trait List and Descriptions

Courtesy of Patricia Duarte, Decision Insight, Inc.

Listed are over 70 descriptions. This tool is used to help groups define and describe the traits and competencies required or desired in the role. This tool is used to strengthen job descriptions, performance reviews, coaching and candidate assessment. Included with each definition are descriptions of each behavior when it is “over done”.

1. Action Oriented
2. Acumen - Organizational
3. Approachability
4. Adaptability
5. Analysis
6. Assertiveness
7. Dealing with Ambiguity
8. Ambition
9. Compassion
10. Coaching
11. Collaboration
12. Communication
13. Compliance
14. Managing Change
15. Comfort Around Power
16. Command Skills
17. Composure
18. Conflict Management
19. Confrontation
20. Creativity
21. Critical Thinking
22. Constituent / Stakeholder Focus
23. Decision Making
24. Dedication
25. Delegation
26. Developing Others / Mentoring
27. Directing Staff
28. Diversity / Culture Building
29. Empowerment
30. Ethics & Values
31. Expertise
32. Hiring & Selecting People
33. Humor
34. Influence
35. Information Management
36. Innovation
37. Integrity & Trust
38. Intellectual Acumen
39. Interpersonal Savvy
40. Leadership
41. Listening
42. Manageability / Coachability
43. Managerial Courage
44. Measuring Performance
45. Motivating Others
46. Negotiating
47. Organizational Agility
48. Organizing
49. Planning
50. Dealing with Paradox
51. Patience
52. Peer Relationships
53. Perseverance
54. Personal Disclosure
55. Perspective
56. Problem Solving
57. Political Savvy
58. Presentation Skills
59. Priority Setting
60. Process Management
61. Results Driven
62. Self Development
63. Self Knowledge
64. Sizing People Up
65. Standing Alone / Independent
66. Strategic Agility
67. Managing in Systems
68. Building Team Spirit
69. Technical Learning
70. Time Management
71. Total Quality Management
72. Understanding Others
73. Managing Vision & Purpose
74. Work / Life Balance

#### Process Instructions:

1. Review list and descriptions.
2. Highlight 10 – 15 Traits you feel are required / highly desired.
3. Review and discuss with other stakeholders to reach consensus.
4. Add Traits to (internal) job description, performance reviews, individual development, succession planning... staff and pre-hire candidate assessment.

## 1. ACTION ORIENTED

Enjoys working hard; is action oriented and full of energy for the things that he/she sees as challenging; not fearful of acting with a minimum of planning; seizes opportunities when they arise; self-starter; multi-tasker; self motivated

*May be impatient and challenged staying focused and on task with processes that require a methodical approach or are tedious. May be a workaholic, ignore personal life, burn out; may have personal and family problems due to disinterest and neglect; may not attend to important but non-challenging duties and tasks.*

## 2. ACUMEN

Ability to deal effectively with organizational politics and build alliances with people at all organizational levels. Knowledgeable in current and possible future policies, practices, trends, and information affecting the business and/or organization; understand the competition; is aware of how strategies and tactics work in the organization, the community, and/or the marketplace. Understands the agendas and perspectives of others; knows which goals are worth fighting for and when it's best to compromise; knows the right things to say at the right times; knows when to lead and when to follow; anticipates others reactions or positions accurately; has good timing; involves the right people at the right time; "pre-sells" ideas to key people before introducing them to the whole; effectively uses formal and informal channels to get results.

*May be viewed as not trustworthy or playing both sides of the fence. May be viewed negatively for working the angles.*

## 3. APPROACHABILITY

Is easy to approach and talk to; spends the extra effort to put others at ease; can be warm, pleasant, and gracious; is sensitive to and patient with the interpersonal anxieties of others; builds rapport well; is a good listener; is an early knower getting informal and incomplete information in time to do something about it.

*May waste too much time rapport-building in meetings; may be misinterpreted as easygoing; may have too strong a desire to be liked; may avoid necessary negative or unpleasant transactions; may try to smooth over real issues and problems.*

## 4. ADAPTABILITY

Ability to demonstrate flexibility in dealing with difficult or unpleasant circumstances, or adjusting to changing conditions in order to meet objectives. Shows resilience in the face of conflict, changing circumstances, shifting priorities, adversity and multiple demands. Has a high tolerance for ambiguity; does not easily get defensive about feedback but instead uses it as a tool to do a better job; works well under stress and pressure.

*May be viewed as inconsistent and/or giving mixed signals.*

## 5. ANALYSIS

Ability to gather and/or examine information facts and data and apply it to a situation in order to arrive at a conclusion, solve a problem or make a valid decision or judgment. Uses a systematic approach; seeks input from a variety of sources; effectively applies principles of inductive or deductive logic; consults research and gathers information; sets appropriate limits on data gathering to make timely decisions; uses flowcharts and other visuals to help others understand the data; conducts “what-if” analyses to test hypotheses; may use a formal problem solving method; able to check self and other’s logic to determine the validity of a conclusion or decision.

*May not exhibit as much intuition; may frustrate those who are more instinctual. May be criticized for taking too much time gathering data; may suffer from “analysis paralysis”; may have a strong need for accuracy in areas that may or may not be considered essential.*



## 6. ASSERTIVENESS

Ability to express oneself in a confident manner and maintain a point of view even while experiencing opposition. Willing to take the lead. Takes initiative readily. Competitive and achievement oriented; has a strong desire to influence others. Is persistent without being abusive; keeps a positive attitude about goals and objectives; able to say “no” to others; does not hesitate to ask for resources; questions authority; is results oriented; willing to ask tough questions; is not threatened by conflict; manages disagreements well.

*May be considered too strong in personality or too eager to always be in charge. May offend or otherwise prohibit or restrict others from participation. May struggle to be diplomatic; may have difficulty taking direction or leadership from others; may be difficult to manage.*

## 7. DEALING WITH AMBIGUITY

Can effectively cope with change; can shift gears comfortably; can decide and act without having the total picture; isn’t upset when things are up in the air; doesn’t have to finish things before moving on; can comfortably handle risk and uncertainty. May move to conclusions without enough data; may tend to change things too often; may undervalue orderly problem solving; may reject precedent and history; may err toward the new and risky at the expense of proven solutions; may overcomplicate things; may fill in missing gaps by seeing problems that aren’t there.

## 8. AMBITION

Actively works to develop personal fulfillment, knows what he/she wants from a career; makes things happen for self; markets self for opportunities; doesn’t wait for the organization to act to ask.

*May make unwise career choices; may be seen as excessively ambitious; may not pay enough attention to the job at hand; may not take career advice comfortably; may not trust others to make career decisions for him/her.*

## 9. COMPASSION

Genuinely cares about people; is concerned about their work and non-work problems; is available and ready to help; is sympathetic to the plight of others not as fortunate; demonstrates real empathy with the joys and pains of others. Is interested in the work and non-work needs of subordinates and managers; asks about their plans, hopes, problems, and desires; knows about their concerns and questions; is available for listening to personal problems; is sensitive to workloads and rewards effort, hard work, and results.

*May have trouble being firm with subordinates; may give them too much room for excuses; may not challenge them to perform beyond their comfort zone; may get too deep into their lives; may not be able to make objective calls on performance and potential; may not know when to stop showing care when efforts are rejected. May smooth over conflict in the interest of harmony; may not be tough enough in and may make too many concessions; may get so close to people that objectivity is affected and they are able to get away with too much; may have trouble with decisions too close to a 50/50 proposition.*

## 10. COACHING

Ability to evaluate the development needs of employees and provide guidance in improving current job performance or preparing for career advancement. Able to recognize people's areas of strength as well as blind spots; encouraging; creates the conditions that foster growth; assists others in their development plans; suggests appropriate resources and information; provides people opportunities to be visible in the organization; shares the credit gives constructive feedback; is not punitive in responding to mistakes.

*May be viewed as too soft failing to take action or be tough when necessary.*

## 11. COLLABORATION

Ability to work effectively with others in order to achieve meaningful results. Willing to establish alliances and partnerships; actively participates seeking results which benefit all parties in making plans, solving problems, making decisions, completing tasks and accomplishing goals; does not use personal or position power to satisfy one's own needs at the expense of others; is genuinely willing to consider the suggestions and ideas of others; clarifies and communicates agreements, actions plans and goals to assure understanding.

*May not be as productive working independently and less willing to be accountable for individual results.*

## 12. COMMUNICATION

Ability to effectively present ideas, transmit information or convey concepts to individuals or groups of varying educational, cultural and experience levels. Able to write clearly and succinctly in a variety of communication settings and styles. Can get messages across that have the desired effect. Assimilates verbal information rapidly; can abstract conclusions from verbal information proficiently. May be viewed as all talk and not enough action;

*May invest too much time crafting communications; may too often try for perfection when something less would do the job; may be overly critical of the written work rather than evaluating the substance of others. May be less effective with those who prefer more straightforward and concrete communication.*

### **13. COMPLIANCE**

Ability to follow established guidelines, policies, and procedures in order to insure consistency or to protect the safety or preserve the welfare of others. Prefers to follow prescribed sequences; is generally thorough and accurate; enjoys documentation; prefers to stick to established routines; does not act on impulse; tends to avoid risks; not easily persuaded to make exceptions to policies and guidelines; will defer to a higher authority when an exception to policy or procedure is needed.

*May be too much of a rule follower not allowing enough room for independent judgment or leadership; may miss an opportunity for fear of taking appropriate risks. May resist change preferring to hold on to structures, rules and processes that are known and familiar.*

### **14. MANAGING CHANGE**

Ability to initiate, implement and promote change in order to create new opportunities, meet market demands, develop new technology, respond to customer or employee needs, or maintain continuous improvement efforts. Embraces change as positive.

*Gets bored with the status quo; needs change to stay motivated; likes to upset the apple cart seeing it as a way to invigorate others. May confuse others with his/her need for change; may seek out change for change's sake regardless of the situation.*

### **15. COMFORT AROUND POWERFUL LEADERS**

Works effectively, confidently and comfortably with top leaders from across the economic, academic, philanthropic, political and /or international landscape; understands how powerful leaders think and process; can determine the best way to get things done by talking their language and responding to their concerns and needs...

*May manage up too much; may be seen as too political and ambitious; may spend too much time with senior executives, parrot their positions, take top executives for granted, and over interpret acceptance by them; career may be too dependent on champions; may be too free with proprietary information.*

### **16. COMMAND SKILLS**

Is not afraid to take charge when trouble comes; does whatever it takes to get the job done despite resistance; takes unpopular stands if necessary; faces difficult situations with guts and tenacity; encourages direct and tough debate but isn't afraid to end it and move on; is looked to for direction in a crisis; relishes leading.

*May not be team player; may not be tolerant of other people's ways of doing things; may choose to strongly lead when other more team-based tactics would do as well or better; may not develop other leaders; may become controversial and be rejected by the team, unit, or organization.*

## 17. COMPOSURE

Is cool under pressure; does not become cynical, moody, or hostile when times are tough; is considered mature; can be counted on to hold things together during tough times; can manage personal stress; is not knocked off balance by the unexpected; doesn't show frustration when resisted or blocked; is a settling influence in a crisis.

*May not show appropriate emotion; may be seen as cold and uncaring; may seem rigid in situations where most others show feelings, may be easily misinterpreted; may not be able to relate well to those whose actions/decisions are based more on feelings than on thinking.*

## 18. CONFLICT MANAGEMENT

Steps up to conflicts, seeing them as opportunities for improvement; can hammer out tough agreements and settle disputes equitably; good at focused listening; understands others quickly; can find common ground and get cooperation with minimum noise.

*May be seen as overly aggressive and assertive; may get in the middle of everyone else's problems, may drive for a consensus solution before others are ready; may have a chilling effect on open debate; may have some trouble with issues and problems that are close to 50/50 propositions.*

## 19. CONFRONTATION

Deals with problems in a timely manner; doesn't allow problems to fester; regularly reviews performance of subordinates and holds timely discussions; can make negative decisions when all other efforts fail, deals effectively with resistant and troublesome issues and people.

*May be too quick to act on problem subordinates; may not put enough development effort toward the problem, may expect turnarounds in too short a time; may expect miracles.*



## 20. CREATIVITY

Comes up with a lot of new and unique ideas; thinks outside the box; sees things differently; easily makes connections among previously unrelated notions; tends to be seen as original and good in brainstorming settings.

*May get so infatuated with marginally productive ideas that he/she wastes time; may get involved in too many things at once; may not follow through after the idea; may be disorganized or poor at detail; may not relate well to those who are less creative.*

## 21. CRITICAL THINKING

Ability to examine information, facts and data and make valid judgments based on content and quality. Uses logic to support judgments; recognizes when assumptions have been made and whether they are logically valid or invalid based on available evidence; able to determine if arguments are strong or weak; able to draw logical conclusions; weighs the known against the unknown, predicting benefits and costs; controls impulsiveness;

*May get frustrated when hard data and facts are not available when making decisions; may be distrustful and resist information from those h/she believes to be less analytical.*

## 22. CUSTOMER FOCUS / CONSTITUENT OR STAKEHOLDER FOCUS

Is dedicated to meeting the expectations and requirements of internal and external customers; gets first-hand customer information and uses it for improvements in products and services; talks and acts with customers in mind; establishes and maintains effective relationships with customers both internally and externally and gains their trust and respect.

*May be overly responsive to customer demands; may be too willing to change established processes and timetables to respond to unreasonable customer requests; may make too many exceptions and not form consistent policies, practices, and processes for team members to learn and follow.*

## 23. DECISION MAKING

Makes tough decisions in a timely manner, sometimes with incomplete information and under tight deadlines and pressure; has a bias for action. Makes good decisions based upon a mixture of analysis, wisdom, experience, and judgment; most of his/her solutions and suggestions turn out to be correct and accurate when judged over time; sought out by others for advice and solutions.

*May jump to conclusions and take action before reasonable consideration of the information; may get caught up in action for its own sake; may have a chilling effect on getting everyone's input before acting; might be considered impulsive and impatient; may not be methodical or do enough analysis before making a decision. May see him/herself as overly wise or close to perfect, as someone who can't or doesn't make mistakes; may be seen as stubborn and not willing to negotiate or compromise.*

## 24. DEDICATION

Ability to fully invest oneself in the job and exhibit a high level of commitment; often makes personal sacrifices in order to get the job done or to handle a temporary increase in the workload

*May be a workaholic unable to maintain a healthy life balance.*

## 25. DELEGATION

Clearly and comfortably delegates both routine and important tasks and decisions, broadly shares both responsibility and accountability; tends to trust people to perform; lets subordinates finish their own work.

*May over delegate without providing enough direction or help; may have unrealistic expectations for subordinates, may over structure tasks and decisions before delegating them to the point of limiting individual contributions; may be seen as over controlling.*

## 26. DEVELOPING STAFF

Provides challenging and stretching tasks and assignments; holds frequent development discussions; is aware of individual goals; constructs compelling development plans and executes them; pushes staff to accept developmental moves; brings out the best in people; is a people builder.

*May concentrate on the development of a few subordinates at the expense of the team; may create work inequities as challenging assignments are parceled out; may be overly optimistic about how far subordinates can grow.*

## 27. DIRECTING EMPLOYEES

Is good at establishing clear directions; sets stretching objectives; distributes the workload appropriately; lays out work in a well-planned and organized manner; maintains two-way dialogue with subordinates on work and results; brings out the best in people. Sets SMART goals and objectives; is fair and consistent.

*May not do enough work him/herself; may only delegate pieces and not share the larger picture, may be overly directive and stifle creativity and initiative; may be viewed as controlling;*



## 28. DIVERSITY / CULTURAL BUILDING

Effective with diverse people; deals effectively with all genders, ethnicities, k cultures, abilities, multigenerational age and other differences; hires or selects diversity; supports and demonstrates equal and fair treatment and opportunity for all.

*May make too many allowances for members of a particular class; may not apply equal standards and criteria to all classes; may show an inappropriate preference for a single class of people; may compromise standards to achieve diversity.*

## 29. EMPOWERMENT

Ability to build or contribute to a workplace culture in which people take personal responsibility for making themselves and their organization successful. Actively promotes and “entrepreneurial spirit” within the organization; gives appropriate latitude and authority; maintains high expectations for performance; fosters independent thinking and decision making; turns people into problem solvers; acts with integrity; acts in a positive political manner; effectively challenges the status quo.

*May be viewed as not having appropriate control over people and outcomes.*

## 30. ETHICS AND VALUES

Adheres to an appropriate and effective set of core values and beliefs during both good and tough times; acts in line with those values; rewards the right values and disapproves of others; practices what he/she preaches.

*May go to battle based on beliefs and values when not appropriate; may be overly sensitive to situations he/she sees as litmus tests of principles, values, and beliefs; may be seen as stubborn and insensitive to the real need for change and compromise; may be overly critical of those who do not hold the same values.*

## 31. EXPERTISE

Has deep subject knowledge; may be considered an expert at what h/she does.

*May be seen as too narrow; may overdevelop or depend upon technical and functional knowledge and skills at the expense of personal, interpersonal, managerial, and leadership skills.*

## 32. HIRING AND SELECTING PEOPLE

Has a strong ability to identify talent; hires the best people available from inside or outside; is not afraid of selecting strong people; assembles talented staffs; knows how to effectively screen and select talent using objective methods. Understanding core competencies and values is as important as experience and education; understands the value of diversity. Does not depend on hiring h/her own likeness; knows how to shore up blind spots on the team with talent that will drive objectives forward. Does not rely on stereotype thinking to make judgments about people and performance.

*May overlook talent based by focusing too much on gut instinct during the interview performance process; may select on surface characteristics; may assemble a team of individual performers who aren't good team players; may prefer people who aren't broad enough for further growth; may be challenged selecting people who are stronger, more knowledgeable or talented than h/she is.*

### 33. HUMOR

Has a positive and constructive sense of humor; can laugh at him/herself and with others; is appropriately funny and can use humor to ease tension. Lifts morale with h/her presence.

*May disrupt group process with untimely or inappropriate humor; may use humor to deflect real issues and problems; may use humor to criticize others and veil an attack; may use humor to deliver sarcasm or cynicism; may be perceived as immature or lacking in appropriate seriousness; his/her humor may be misinterpreted.*

### 34. INFLUENCE

Ability to persuade others to take a course of action or to alter their opinion in the absence of direct authority over them.

*May be too considered too political and not trustworthy.*

### 35. INFORMATION MANAGEMENT

Ability to evaluate the requirements of the organization for information and to provide information on a timely basis.

*May provide too much information or not enough; may upset people by blind sighting, giving them more information than they can handle or preliminary information that turns out not to be true.*

### 36. INNOVATION

Has good judgment about which creative ideas and suggestions will work; has a sense about managing the creative process of others; can facilitate effective brainstorming; can project how potential ideas may play out in the marketplace; is good at bringing the creative ideas of others to market.

*May err toward the new and reject the old; may prefer creative people and undervalue those less creative; may get too far out in front of others in thinking and planning.*

### 37. INTEGRITY AND TRUST

Is widely trusted; is seen as a direct, truthful individual; can present the unvarnished truth in an appropriate and helpful manner; keeps confidences; doesn't blame others for his/her own mistakes or misrepresent him/herself for personal gain or protection.

*May be too direct at times, which may catch people off guard and make them uncomfortable; may push openness and honesty to the point of being disruptive; may be so "only the facts" driven as to omit drawing reasonable conclusions, rendering opinions or fixing blame, even when it's reasonable.*

### 38. INTELLECTUAL ACUMEN

Is bright and intelligent; deals with concepts and complexity comfortably; described as intellectually sharp, capable, and agile. Learns quickly when facing new problems; is a relentless and versatile learner; is committed to continuous learning through various methods; analyzes both successes and failures for clues to improvement; experiments and is open-minded about finding solutions; enjoys the challenge of unfamiliar tasks; quickly grasps the essence and the underlying structure.

*May leave others behind; may make others feel stupid or diminished; may be easily bored or frustrated with repetition; may use vocabulary unfamiliar with others and be viewed as talking over their head; may be impatient with those who need more time to grasp information or are less knowledgeable about a certain subject. May only accept h/her own solutions; may not be good at routine administration or unchallenging, repetitious tasks or jobs.*

### 39. INTERPERSONAL SAVVY

Relates well to all kinds of people up, down, and sideways, inside and outside the organization; builds appropriate rapport; listens; builds constructive and effective relationships; uses diplomacy and tact; truly values people; can diffuse even high –tension situations comfortably.

*May be able to get by with smooth interpersonal skills, may spend too much time building networks and glad-handing; may not be taken as substantive by some; may not be a credible take-charge leader when that's necessary; may have some trouble and freeze when facing issues and problems close to a 50/50 proposition.*

### 40. LEADERSHIP

Ability to establish a meaningful vision that defines organizational purpose and through exemplary behavior, expertise and personal power, directs the thinking and actions of others in order to achieve the desired result. Stimulates people to stretch and grow, helping them overcome obstacles. Is a model of integrity and hard work; sets high expectations for self and others; commands the attention and respect of people at all organization al levels; challenges others to make tough choices; acts as a catalyst for change and continuous improvement; clarifies roles and responsibilities; provides clear direction and sets priorities; provides development support including training opportunities and challenging assignments.

*May be considered bossy; may be intimidating; may not listen to those who are less assertive; may be impatient with those who do not understand or share h/her vision.*

### 41. LISTENING

Practices attentive and active listening; has the patience to hear people out; can accurately restate the opinions of others even when he/she disagrees.

*May spend too much time listening; may avoid necessary intervention; others may confuse listening with agreement.*

## 42. MANAGEABILITY / COACHABILITY

Responds and relates well to supervisors and management; would go out of his/her way to work hard for a good manager; is open to learning from good coaches and who provide appropriate direction and autonomy; likes to learn from those who have been there before; easy to challenge and develop; is comfortably coach-able; works within the rules; comfortable with authority and the limits imposed; will be cautious with authority

*May be too dependent on bosses and high status figures for advice, approval or affirmation; may not trust self or others of lower status; may model bad boss behaviors to avoid questioning authority and win the favor. May struggle in roles that are not well defined or structured. May need too much attention and feedback from management to feel confident h/she is doing a good job.*

## 43. MANAGERIAL COURAGE

Provides current, direct, complete, and “action-able” positive and corrective feedback to others; doesn’t hold back anything that needs to be said; always lets people know where they stand; faces up to people problems quickly and directly; is not afraid to take negative action (e.g. put on probation, fire, demote etc.) when necessary.

*May be overly critical of others; may be too direct and heavy-handed when providing feedback; may provide too much negative and too little positive feedback; may put too much emphasis on the dark side.*

## 44. MANAGING AND MEASURING PERFORMANCE

Clearly assigns responsibility for tasks and decisions; sets clear objectives and measures; monitors process, progress, and results appropriately; delivers timely and objective feedback on accomplishments.

*May be over controlling; may look over people’s shoulders; may prescribe too much and not empower people.*

## 45. MOTIVATING OTHERS

Can accurately assess individual strengths and leverage them to get the best out of them; pushes tasks and decisions down; empowers others; invites input from each person and shares ownership and visibility; makes each individual feel their work is important; is someone people like working for and with. Knows how to effectively use reward and recognition. Uses positive reinforcement rather than negative methods; embraces the concept of pull versus push in motivating others.

*May act too much like a cheerleader; may spend too much time coaxing others; may not take tough stands when the situation calls for it; may wait too long for input; may be reluctant to assign tough work assignments for fear of affecting the esprit des corps.*

#### **46. NEGOTIATING**

Can negotiate skillfully in tough situations with both internal and external groups; can settle differences with minimum noise; can win concessions without damaging relationships; can be both direct and forceful as well as diplomatic; gains trust quickly of other parties to the negotiations; has a good sense of timing; aims for win-win solutions

*May leave people-damage in his/her wake; may walk over people's feelings; may always need to win; may hang on to a position too long; may become overly accommodating and be reluctant to walk away; may need to smooth over everything; may take too long to get things decided.*

#### **47. ORGANIZATIONAL AGILITY**

Knowledgeable about how organizations function; knows how to get things done both through formal channels and the informal network; understand the origin and reasoning behind key policies, practices, and procedures.

*May be seen as too political; may spend too much time maneuvering for advantage*

#### **48. ORGANIZING**

Can marshal resources (people, funding, material, and support) to get things done; can orchestrate multiple activities at once to accomplish a goal; uses resources effectively and efficiently; arranges information and files in a useful manner.

*May not be tolerant of normal chaos; may too often want to do things his/her own way; may not be open to suggestions and input; may lose his/her composure when things don't go as planned.*

#### **49. PLANNING**

Ability to develop short and long range plans that are comprehensive, realistic, and effective in achieving established objectives. Accurately scopes out length and difficulty of tasks and projects; sets objectives and goals; breaks down work into the process steps; develops schedules and task/people assignments; anticipates and adjusts for problems and roadblocks; measures performance against goals; evaluates results.

*May be overly dependent on rules, regulations, procedures, and structure; may leave out the human element of the work; may be inflexible and have trouble with rapid change*

#### **50. DEALING WITH PARADOX**

Is very flexible and adaptable; can act in ways that seem contradictory; can be tough and compassionate, empathic and objective; can lead and follow; can be an individual contributor and a team player; can be self-confident and appropriately humble; is seen as balanced despite the conflicting demands of the situation.

*May be seen as two-faced or wishy-washy; may change too easily from one style or mode to another; may misread what skills are called for; may confuse people who observe him/her across different settings; may be misinterpreted.*

## 51. PATIENCE

Is tolerant with people and processes; listens and checks before acting; tries to understand the people and the data before making judgements and acting; implements change well; waits for others to catch up before acting; sensitive to due process and proper pacing; keeps his/her composure under stress; follows established process.

*May wait too long to act; may try to please everyone; others may confuse attentive listening with acceptance of their position; may freeze when faced with issues too close to a 50/50 proposition; may let things fester without acting.*



## 52. PEER RELATIONSHIPS

Can quickly find common ground and solve problems for the good of all; can represent his/her own interests and yet be fair to other groups; can solve problems with peers with a minimum of noise; is seen as a team player and is cooperative; easily gains trust and support of peers; encourages collaboration; can deliver bad news effectively to peers.

*May touch base with too many people and be overly concerned with making everyone happy; may be too accommodating; may invest too much in peer relationships at the expense of others; may be uncomfortable with relationships where everyone's not equal may share sensitive information inappropriately just to solidify a relationship.*

## 53. PERSEVERANCE

Pursues everything with energy, drive, and a need to finish; seldom gives up before finishing, especially in the face of resistance or setbacks.

*May stick to efforts beyond reason, in the face of overwhelming odds and evidence to the contrary; may be seen as stubborn and unyielding; may not set appropriate priorities; may find it difficult to change course; may confuse personal have-to-do's with what most needs to be done.*

## 54. PERSONAL DISCLOSURE

Willingly shares his/her thoughts about personal strengths, weaknesses, and limitations; freely and publicly admits mistakes and shortcomings; is open about personal beliefs and feelings; is an open book to those around him/her regularly.

*May turn off some people by excessive directness; may leave him/herself open for criticism because of his/her honesty; total openness and directness may actually lead to a lack of trust; open style may lack credibility with some.*

## 55. PERSPECTIVE / RANGE OF INTERESTS

Looks toward the broadest possible view of an issue/challenge; has broad-ranging personal and business interests and pursuits; sees farther into the future than most; can easily pose credible alternate scenarios for planning; thinks globally.

*Might have some trouble concentrating on the here and now; may leave others behind when he/she speculates on the future and the broad view of an issue; may not set practical priorities between the tactical and the strategic; may always be reaching for too much and/or the ideal/ may see connections that aren't there.*

## 56. PROBLEM SOLVING

Ability to systematically organize and evaluate information in order to determine the true cause of the problem and apply corrective action. Solves difficult problems with effective solutions; asks good questions and probes all fruitful sources for answers; can see underlying or hidden problems and patterns; is excellent at honest analysis; looks beyond the obvious and doesn't stop at the first answers.

*May be viewed as negative or pessimistic. May tend toward analysis paralysis; may wait too long to come to a conclusion; may not set analysis priorities; may get hung up in the details and miss the big picture; may make things overly complex; may not take reasonable risks; may do too much of the analysis personally.*

## 57. POLITICAL SAVVY

Can maneuver through complex political situations effectively and quietly; is sensitive to how people and organizations function; anticipates where the land mines are and plans his/her approach accordingly; views corporate politics as a necessary part of organizational life and works to adjust to that reality; is a maze bright person.

*May be seen as excessively political; may not be trusted; may tell others what they are expecting to hear rather than what he/she knows to be true; may be seen as using too much style and too little substance; may be seen as manipulative and scheming.*

## 58. PRESENTATION SKILLS

Is effective in a variety of formal presentation settings: one-on-one, small and large groups, with peers, subordinate, and bosses; is effective both inside and outside the organization, on both cool data and hot and controversial topics; commands attention and can manage group process during the presentation; can change tactics midstream when something isn't working.

*May try to win with style and presentation skills over fact and substance; may be able to wing it and dance without really being prepared; may be able to sell things that shouldn't be sold.*

## 59. PRIORITY SETTING

Spends his/her time and the time of others on what's important; quickly zeros in on the critical few and puts the trivial many aside; can quickly sense what will help or hinder accomplishing a goal; eliminates roadblock; creates focus.

*May let the trivial accumulate into a critical problem; may too quickly reject the priorities of others and cause a feeling of rejection; may have a chilling effect on necessary complexity by requiring everything to be reduced to the simple; may confuse simple with simplistic; may be too dominant a force on priorities for the team.*

## 60. PROCESS MANAGEMENT

Good at figuring out the processes necessary to get things done; knows how to organize people and activities; understand how to separate and combine tasks into efficient work flow; knows what to measure and how to measure it; can see opportunities for synergy and integration where others can't; can simplify complex processes; gets more out of fewer resources.

*May always be tinkering and refining – nothing is ever the same for long; may have trouble explaining her/his vision of a process; may never finish anything; may always be dissatisfied because of unreasonable high standards and expectations of self and others; may attempt to put too much together at once; may misjudge the capacity of others to absorb change.*

## 61. RESULTS

Can be counted on to exceed goals successfully; is constantly and consistently one of the top performers; very bottom-line oriented; steadfastly pushes self and others for results.

*May go for results at all costs without appropriate concern for people, team, due process, or possibly norms and ethics; may have high turnover under him/her due to the pressure for results; may not build team spirit; may not celebrate and share successes; may be very self-centered.*

## 62. SELF DEVELOPMENT

Knows strengths and how to deploy them; knows weaknesses and works to neutralize some and work on others; knows personal limits and works to compensate for them; understands that different situations and levels may call for different skills and approaches; is personally committed to and actively works to continuously improve him/herself.

*May be self-help development junkie; can lead to navel-gazing; may confuse others with constant efforts to improve and change; may be too self centered; may be susceptible to self-help fads; may spend too much time improving and too little time acting and performing.*

### 63. SELF KNOWLEDGE

Picks up on the need to change personal, interpersonal, managerial behavior quickly; watches others for their reactions to his/her attempts to influence and perform; seeks feedback; is sensitive to changing personal demands and requirements and changes accordingly. Knows personal strengths, weaknesses, opportunities, and limits; seeks feedback; gains insights from mistakes; is open to criticism; isn't defensive; is receptive to talking about shortcomings; looks forward to balanced (pluses and minuses) performance reviews and career discussions

*May be seen as too changeable; may shift situationally too easily and leave the impression of being wish-washy; may err toward preferring the new to the tried and true; may confuse people by being so adaptable. May be too self-critical, too open about self; may not move past knowledge to improvement and action; may spend too much time in self-insight activities; may be too dependent upon waiting for feedback' may overly solicit feedback.*

### 64. SIZING UP PEOPLE

Is a good judge of talent; after reasonable exposure, can clearly articulate the strengths and limitations of people inside or outside the organization; can accurately project what various people are likely to do across a variety of situations.

*May be hypercritical of others; may be unwilling to alter an initial judgement about others; may not look for or be open to further evidence; may miss on slow starters and quiet and less expressive people.*

### 65. STANDING ALONE / INDEPENDENCE

Will stand up and be counted; doesn't shirk from personal responsibility; can be counted on when times are tough; looks forward to taking charge of a problem or issue; is comfortable working alone on a tough assignment.; adventurous

*May be a loner and not a good team player or team builder; may not give appropriate credit to others; may be seen as too self-centered.*

### 66. STRATEGIC AGILITY

Sees ahead clearly; can anticipate future consequences and trends accurately; has broad knowledge and perspective; is future oriented; can articulately paint credible pictures and visions of possibilities and likelihood's; can create competitive and breakthrough strategies and plans.

*May be seen as too theoretical; may not be tolerant of or have patience with day-today details; may over-complicate plans; may not be able to communicate with tactical or less complex people.*

### 67. MANAGING THROUGH SYSTEMS

Can design practices, processes, and procedures which allow managing by remote control; is comfortable letting things manage themselves without intervening personally; can make things work through others without being there; can impact people and results by remote communication.

*May be too personally remote from subordinates, tough to reach and talk to, out of touch with the work; may get too comfortable having things run on autopilot; may get surprised by negative events; may be slow to change the system.*

## **68. BUILDING TEAM SPIRIT**

Creates strong morale and spirit in his/her team; shares wins and successes; fosters open dialogue; lets people finish and be responsible for their work; lets subordinates present to senior management; acts as if real success is the success of the whole team; creates a feeling of belonging in the team.

*May not treat subordinates as unique individuals; may slow down reasonable process by having everything open for debate; may go too far in not hurting people's feelings and not making tough decisions; may not develop individual leaders; might not provide take-charge leadership during tough times.*

## **69. TECHNICAL LEARNING APTITUDE**

Picks up on technical things quickly; can learn new skills and knowledge; is good at learning new industry, company, product, or technical knowledge as well as business skills; does well in technical courses and business seminars.

*May learn but not act; may overdo learning at the expense of using it; may be seen as an academic; may not relate well to those who can't catch on as quickly.*

## **70. TIME MANAGEMENT**

Uses his/her time effectively and efficiently; sets priorities; values time; separates the critical few from the trivial many and concentrates his/her efforts accordingly.

*May not take the time to stop and smell the roses; may not give people rapport time with him/her to get comfortable; may be impatient with other people's agenda and pace.*

## **71. TOTAL QUALITY MANAGEMENT**

Is dedicated to providing the highest and quality products and services which meet the needs and requirements of internal and external customers; is committed to continuous improvement through empowerment and management by data; is open to suggestions and experimentation; creates a learning environment leading to the most efficient and effective work processes.

*May become a quality missionary to the exclusion of everything else; may make marginal incremental changes which are more disruptive than helpful; may reject others who have not totally bought into Total Quality; may be over dependent on a single guru or approach.*



## 72. UNDERSTAND OTHERS

Listens carefully to understand various points of view whether or not he/she agrees; suspends judgement until others have had their say; can clearly state opposing views of others even if he/she doesn't accept them; accepts diversity in others; can predict what others will say or do across different situations.

*May be too agreeable with the points of view of others; may have trouble disagreeing or taking an unpopular stand; may take too long to settle issues and problems; may be too accommodating.*

## 73. MANAGING VISION AND PURPOSE

Creates and communicates a compelling and inspired vision or sense of core purpose; sees beyond today; sees possibilities; is optimistic; creates mileposts and symbols to rally support behind the vision; makes the vision sharable by everyone; can inspire and motivate entire units or organizations; is charismatic.

*May leave people behind; may lack patience with those who don't understand or share his/her vision and sense of purpose; may lack appropriate detail-orientation and concern for administrative routine; may lack follow through on the day-to-day tasks.*

## 74. WORK / LIFE BALANCE

Maintains a conscious balance between work and personal life so that neither is neglected or damages the other; is not one-dimensional; knows how to attend to both; gets what he/she wants from both.

*May not be flexible enough when work or personal life demands change dramatically; may not be able to adjust one at the expense of the other; may value the status quo over temporary discomfort; may exhibit the extreme of either being overly demanding or not demanding enough of others.*

# Guide to Putting Together a *Job Manual*

## Information to be incorporated into job manuals and succession planning work

Tricia Maguire, *SkillWorks*

A job manual that maintains relevant information on a staff person's job can serve two purposes. First, when maintained regularly, it can be a one-stop resource for that person of contacts, processes, specific information related to the job, and of resources needed to perform well on the job. Secondly and importantly, it can serve as a key tool to facilitate succession planning because it contains up-to-date information on the particular position. Requiring regular updates of the manual as part of job expectations can help ensure that it occurs.

### 1) Organization Information

- a. History, mission, values
- b. Board of directors
- c. Organizational chart(s)
- d. Department/program descriptions
- e. Contact list w/short bios
- f. Info on shared file system and/or website/intranet
- g. Information on funding sources

### 2) Job specific Information

- a. Job description
- b. Work plan/timeline/calendar
- c. Reporting that staff is responsible for, due dates, and instructions on how to complete
- d. List of work categories and tasks under each with "how to" details
- e. Any templates or examples associated with tasks (e.g. letters, case management reports, student action plans)
- f. Any cross-training with other positions – both who you back-up for and who is back-up for you
- g. Potential special projects that role may be involved in
- h. Any helpful internal or external resources

### 3) Partners Information

- a. Employer partners, profiles, contacts, helpful tips (e.g. prefer email to phone calls)
- b. Post-secondary education partners, profiles, contacts, tips
- c. Community partners, profiles, contacts, tips
- d. Technical/occupational/union partners

# Work Plan Template – For Short-term Leaves of Absence

Loh-Sze Leung, SkillWorks

## Maternity/Medical Leave/Vacation Coverage Sample Work Plan

Work area (examples)	Tasks	Timeline	Responsible*	Documents/ Resources/ File Location
<i>Grants management— Reporting</i>				
<i>Coaching</i>				
<i>Data entry</i>				
<i>Recruitment</i>				
<i>Follow-up</i>				

\* Where more than one name is listed, **BOLD name** takes lead.

# Employer Profile Template

Sarah Griffen

The employer profile should include key information on the employer organization as a whole, including information on its corporate culture, cycles of operations, and other relevant information that staff need to know to perform their work with that employer.

Employer: \_\_\_\_\_

Address: \_\_\_\_\_

Web site: \_\_\_\_\_

## Key contact people within employer

Top contacts (there should be a separate employer contact profile on these people)

Name	Title	Phone	Email	Role related to project
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**Other contacts** (employer contacts with some involvement in the project)

Name	Title	Phone	Email	Role related to project
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## Important employer operational information:

Key dates (employers budget cycle and deadlines, production crunch times, etc).

Regulatory information/constraints,

Operational work that affects project, etc.

Corporate culture:

**History with project** (year began involvement, former staff people critical on project, general narrative about highpoints and issues)

**Project Outcomes at Employer** (keep running list of quarterly, semi-annual, or annual outcomes for employer)

# Employer Contact Profile Template

Sarah Griffen

Maintaining a record, either on a sheet of paper in a job manual or in a database (preferable), helps to catalogue and update information on specific employer contacts.

## Contact Information

Employer: \_\_\_\_\_

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

Title: \_\_\_\_\_

Department: \_\_\_\_\_

Address: \_\_\_\_\_

Location of Office: \_\_\_\_\_

Email: \_\_\_\_\_

Phone – Office: \_\_\_\_\_

Phone – Cell: \_\_\_\_\_

Notes on preference for contact (ok to use cell, email or phone better, etc.):

Best time of day to contact: \_\_\_\_\_

## Contact Information

Contact person's general scope of responsibilities: \_\_\_\_\_

Key colleagues of the contact person within the employer and why they are important:

Relationship if contact person to project: *(description of role, general level of engagement with project, etc.)*

Meetings with contact person: *(list by date and content; jot down any relevant notes related to meeting)*

Experiences with project: *(note here any positive or negative experiences the contact person has had with the project and the date – for example, someone who got a promotion and thanked the contact person; or someone who was fired and the contact person got negative feedback on the project from that person's manager).*

## Supervisor

Staff person's supervisor (in case of turnover at the employer site): \_\_\_\_\_

Supervisor contact information: \_\_\_\_\_

General notes on supervisor: \_\_\_\_\_

Contacts with supervisor (list by date and content of interaction): \_\_\_\_\_

For more information on this report, please contact:

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