

Individual Action Plan (IAP)
Senior and Emerging Leaders Program

(SL)
Senior Leader

(EL)
Emerging Leader

IAP # 2
Draft

Final

Name	J. F. 'Skip' Byron		
Agency	PHNSY		
Class Session – Indicate name of session	Session 1	Session 2	Session 3
		Leading Change	
Supervisor	Name: Yvette Flynn		Telephone #: 473-8000 X 4177
Consultant	Name: Valerie Martines		

COMPETENCIES (check those relevant to this class/IAP)					
	SL	EL		SL	EL
Interpersonal Skills			Problem Solving	X	
Team Building	X		Leveraging Diversity		
Customer Service			Human Resources Management	X	
Integrity/Honesty			Vision	X	
Conflict Management			Strategic Thinking	X	
Influencing/Negotiating	X		External Awareness		
Creativity and Innovation	X		Accountability	X	
Flexibility	X		Entrepreneurship		
Resilience	X		Partnering		
Continual Learning			Oral Communication		

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Part 1 - PLANNING PHASE

a) Project Title: Build a Performance Management Model (PMM) consisting of Mission, Vision, Goals, Objectives, and Performance Measures for Code 1145 Education and Development Office at PHNSY.

b) Describe the background and current issues relevant to the project (the what and the why): Our Command Education and Development Office is just over three years young with current staffing at nine employees. While we continue to improve our services to better meet customer needs, we must ask ourselves the following:

- has our mission changed,
- do we have new technology that affects our process,
- does our structure continue to support what we do and how we do it,
- does the staff need new competencies to accomplish the work, and
- do we have process with purpose?

I believe it is now time to reframe and publish our mission, vision, goals, objectives, and performance measures as we further develop and refine our processes.

A consolidated team effort in developing, documenting, and publishing a Performance Management Model will allow us to:

- better know our purpose,
- stay focused on what we need to accomplish,
- understand how we will accomplish it,
- help refine our metrics to know that we are achieving what we want to achieve,
- increase the cohesiveness of our cross-functional teams,
- develop a more accountable employee,
- establish more quantifiable measures in preparation for NSPS, and
- help us better circulate our message throughout PHNSY.

c) What are our objectives? (Specific, Measurable, Accountable, Realistic, Timely)

- Develop a mission statement that describes the service we provide, the needs we address, for whom we provide our service, and how we provide it;
- Develop a vision of our desired future state;
- Establish our goals of what we need to do to meet our mission;
- Describe the objectives of how we will accomplish our goals; and
- Refine measures to include customer service, process and outcomes, and employee satisfaction.

Note: In IAP #3 I plan to use the PMM as a foundation to assess needed competencies for job responsibilities, establish individual performance expectations, as well as realize learning opportunities that are aligned with succession planning needs for Code 1145.

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d) Develop an action plan (what, with whom, when, where, how) for approximately 4-6 week period and describe how these actions would demonstrate at least two (2) of the competencies listed above.

NLT Date	Action	POC	Action Complete	Competency Demonstrated
2/11	Present and discuss Performance Management Model with staff (30 minutes).	Skip	2/14	Team Building
2/14	Develop draft Mission, Vision, Values, and Goals statements for Code 1145.	Skip	2/14	Strategic Thinking Vision
2/15	Circulate draft Mission, Vision, Values, and Goals statements to individual staff members for their review and thoughts.	Skip	2/14	Influencing/Negotiating
2/16	Discuss Mission, Vision, Values, and Goals statements with immediate supervisor to ensure alignment with expectations.	Skip	2/9	Accountability Team Building
2/18	Conduct team meetings to brainstorm revisions and complete the Mission, Vision, Values, and Goal statements. Ask staff to establish strategic objectives within their areas of responsibility that support mission and help meet goals.	All	2/17 2/24 2/31	Team Building Accountability
2/22 thru 2/24	Meet individually with staff members to review progress in establishing objectives.	Skip	2/31	Influencing/Negotiating Team Building
2/25	Consolidate strategic objectives. Conduct team meeting to present draft PMM for discussion.	Skip	3/11	Influencing/Negotiating Team Building
2/28	Ask team to add performance objectives to their ILDP under Planned Developmental Activity as applicable to their areas of responsibilities.	All	TBD	Human Resources Management Accountability
2/28	Discuss PMM progress with immediate supervisor to ensure alignment with expectations.	Skip	2/28	Accountability Team Building
2/29	Design marketing approach to display PMM (i.e, web page, brochure, display board).	Team MarKIT	3/3	Strategic Thinking
3/04	Add slides showing Mission, Vision, Values, and Goals to NEO, ILDP Workshop, and Supervisor Training presentations.	Skip	3/3	Strategic Thinking
3/13	Refine measures so that they align with goals and objectives; include customer service, process and outcomes, and employee satisfaction.	Skip	TBD	Problem Solving
3/14	Begin IAP parts 2, 3, and 4	Skip	3/15	Accountability
3/18	Complete IAP parts 2, 3, and 4 and forward to consultant.	Skip	3/21	Accountability

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Part 2 - IMPLEMENTATION & RESULTS PHASE

What happened when you implemented your action plan? What were the results? The Performance Management Model (PMM) became much more involved than I had anticipated. As I began to see the possibilities of our PMM, and how it aligned to the strategies of PHNSY and NSPS, I soon realized a fully developed Performance Management Model for my organization was beyond the scope of this IAP.

As planned, we created a vision of our desired future ideal organizational state, determined our current mission, developed the guiding principles we will employ, established four goals needed to fulfill our mission and move us toward our vision, and determined forty-four strategic objectives of how to accomplish our goals. It was at this point when I decided to continue the PMM to include balanced scorecards for each goal.

Developing performance objectives for each of the strategic objectives was somewhat challenging. However, developing measures and metrics for all the performance objectives proved too demanding. It became evident that we could not determine many of the performance measures within the time constraints of this IAP. Rather, perhaps using an agreement of expectations, the measures should be decided in the months to come, agreed upon between the supervisor who will assume the vacant supervisor position and the employee responsible for the strategic objective.

Part 3 - ASSESSMENT PHASE

a). **What went well? (Impact on Organization).** Feedback from team members indicated the presentation of the PMM concept went well. The team appeared to understand and accept our direction, and appreciated the approach I used (see Reflection Phase).

I felt subsequent meetings in which we valued each team member's time went smoothly. This contributed to the team taking ownership of their role in developing the PMM, and it also reinforced the need to hold structured, efficient meetings (agenda, time line, stay on point, close).

Indicators suggest our fully developed PMM will have a positive and lasting impact on the team and our mission.

b). **In retrospect, would you have done anything differently?** I postponed two meetings in an effort to have all team members present. Oops! Although important to have all team members at meetings, individual schedules (leave, working hours, other commitments) made this a challenge. I decided to hold meetings on a set schedule and back-brief those who could not attend.

In retrospect, the major change would be the amount we tried to accomplish within the time frame established in the plan. In my estimation, it will take another 3 – 4 months to fully develop this initial PMM.

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Part 4 - REFLECTION PHASE

- a). **What concepts, principles and/or approaches have you learned from this project?** My approach with this project was to first brief the team on the Performance Management Model during a 30-minute presentation. This allowed them to digest the overall PMM concept. At subsequent meetings, I spent a few minutes reviewing the part of the Model that we would focus on for that meeting.

During the first meeting (as part of the presentation), I also presented a draft version of the Vision, Mission, Principles, and Goals, presenting it to the team as a starting point from where to move forward. The purpose was to give them something more tangible to relate as I discussed the PMM. I then gave each team member a draft of the section of the PMM we would be discussing at the next meeting, asking them to review and edit as necessary.

I continually emphasized to the team that they should not consider my draft document a final product. The handout was simply a starter on which we would build using a total team effort. Then, I made it a point to praise, accept, and include their ideas. This approach was the most crucial aspect to the success of the outcome.

Feedback showed the team appreciated this approach as a time saver and it helped them better focus on the outcome. They expressed feelings of ownership in the development and result. I believe this approach contributed to the success of our initial PMM development.

- b). **What have you learned about yourself in terms of leadership that might be useful to you in the future?** The results of my Myers-Briggs personality type show me as Extraversion/Sensing/Thinking/Judging (ESTJ). With this knowledge, I worked to my strengths and took a logical, analytical, and objective approach. I wanted to be sure my ideas, plans, and decisions were based on solid fact. I learned that I truly do have a dominant preference to ESTJ, yet it is extremely important to be sensitive to the preference of others on the team.

Using my Team Dimension Profile helped me get passed several chock points. I found myself exploring alternative solutions and ideas provided by the team. At first, I did not perceive a problem, handling the situation with ease. As the project increased in complexity, I soon found myself stalled in the process, making small incremental gains only. I began over-analyzing, trying to fit every aspect of the PMM together...how does this impact that. I realized I was living up to what is considered a potential weakness of a Refiner / Executor. I found myself continuing to 'develop alternatives while trying to pay attention to ALL implementation details associated with each alternative.' To progress this project I had to 'get out of the trees' so that I could 'see the forest'.

The experience gained with this project reinforced that, although we must continually balance the value of a product's outcome with the effort needed to produce the product, we also must continue to resist letting a timeline drive performance. I would rather enjoy the flexibility to modify a timeline to accommodate the quality of a usable product.

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c). **What new information did you acquire that changed your knowledge and understanding of the project/situation?** I realized the PMM is a living document. I fought the urge to ‘just get it done’ ... instead made it a point to get it done right. I realized that if I focused efforts on the PMM, I would meet the requirement of the IAP. The timeline of the IAP then became secondary to the quality of the outcome. I recognized that a fully developed PMM is beyond the scope of my IAP timeline.

When others depend on the timeline, then the decision to modify timelines should be discussed with all team members. This is crucial to the balance of team dynamics. In the final analysis, missing a time-gate is acceptable when it does not impact other team members. To me, the outcome of a process will always take priority over meeting self-imposed, often arbitrary, deadlines.

Part 5 – ENCLOSURES



STRAT_PLAN.pdf



Adobe Acrobat Document



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"Performance Management Model.r

MENTOR and SUPERVISOR COMMENTS (OPTIONAL)

Excellent project, incorporating competencies learned (now demonstrated), superb alignment to PMA and outstanding focus on results (including use of balance scorecard format). Further efforts (most specifically, development of performance measures) are expected to dovetail precisely with NSPS performance-driven concept. Good use of “straw man” documents to preclude having to start from scratch and decision to use set schedule and back brief those unable to attend allowed the project to progress at a reasonable rate (flexibility!).

Yvette Flynn
21 March 2005

IAP CONSULTANT’S COMMENTS

IAP REVIEWED AND DISCUSSED:

Supervisor’s Review:	<input checked="" type="checkbox"/> Yes	<input type="checkbox"/> No	Date: 21 March 2005
Mentor’s Review: (optional)	<input checked="" type="checkbox"/> Yes	<input type="checkbox"/> No	Date: 21 March 2005
IAP Consultant’s Review:	<input type="checkbox"/> Yes	<input type="checkbox"/> No	Date: