

**Individualized Learning Plan
For Leadership Positions (SAMPLE)**

Directions: Use this Individual Learning Plan to help develop the skills for higher-level leadership positions. Work with your manager to reach agreement on objectives, strategies, etc.

Employee's Name:	Job Title:
Department:	Years in Position:

Supervisor's Name:	Job Title:
Department:	Years in Position:

Today's Date: _____ Plan Covering: _____

Below list the capabilities, activities, responsibilities, duties, tasks, or essential job functions of a higher-level leadership position in which you have developmental needs and to which you aspire.

Learn protocol and intricacies of BOS meetings, Pre-Board meetings, etc.

Learn about budget preparation and justification at the department level.

Political savvy and astuteness

Facilitation skills

Personnel management including assessment of performance

Public speaking and making effective presentations

Learning Objective	Methods and Strategies to meet the Objectives	Resources Needed to Achieve Objective (Information, Money, Training, Equipment, Time, etc.)	Deadline or Benchmark Dates	How success of each learning objective will be measured	Verified? (Is there evidence that the objective was met?)
I want to learn more about interacting with elected officials and how decisions are made.	<p>I will attend meetings with department head and BOS members including individual meetings, work sessions and BOS meetings.</p> <p>I will meet with the department head afterward to assess, evaluate, and discuss the meetings.</p>	<p>Time to attend meetings.</p> <p>Time with department head for review and discussion.</p>	4 months. Goal is to attend 4 individual meetings with BOS members, 2 BOS work sessions, and 2 BOS meetings.	<p>Department head will discuss content, answer questions, and evaluate each meeting with me.</p> <p>I will conduct one individual meeting with a BOS member that the department head will observe.</p>	
I want to learn more about the budget process including preparation, presentation, and justification.	I will meet with our department budget analyst and attend department budget meetings and executive and legislative budget reviews.	<p>Time to attend Budget class (no fee)</p> <p>Time to attend budget meetings</p>	6 months to go through entire budget cycle including department preparation, budget reviews and BOS approval.	<p>I will meet with department head after budget cycle to discuss and evaluate.</p> <p>Next year, I will make department budget presentation at department staff meeting.</p>	
I want to improve my verbal communication skills, especially listening	<p>I will attend Human Resources Department OLTD Listening Skills classes.</p> <p>I will choose a mentor whose communication skills I respect and meet with them on a regular basis.</p>	<p>Listening Skills classes (no fee)</p> <p>Agreement from mentor to provide time to assist me.</p>	6 months to complete classes and objective.	I will ask mentor to evaluate our meetings and my communication skills and I will discuss with mentor specific tips from classes.	

I want to improve my time management skills.	I will seek resources such as books, videos and classes on time management. I will ask my supervisor to help me research automated scheduling, resources, etc.	Time to meet with advisor. Possible funding for software if not available in the County system.	4 weeks to research. 3 months to complete objective	I will seek direct feedback from my supervisor regarding any improvement in my time management.	
I want to improve my facilitation skills to improve my ability to lead team meetings and projects.	I will research the availability of facilitation skills training and classes. I will ask my supervisor and department head if I can participate in any cross-functional teams to enhance my facilitation skills.	Time for any appropriate classes. Support from supervisor and department head to participate on teams and use skills.	6 months to complete objective	I will ask fellow team members and peers for direct feedback on my team participation and facilitation skills.	
I want to learn more about the practical side of an administrator's responsibilities such as Pre-Board meetings, BOS meetings, etc.	I will ask department head if I can shadow him for the next several months. I will identify with my department head three other department heads in the County to interview and get their feedback.	Time to attend meetings. Commitment and support from department head for shadowing and interviewing other department heads.	3 months to complete objective	Meeting with department head for evaluation and to answer questions resulting from meetings and interviews.	
I want to significantly enhance my technology and computer skills	I will meet with my supervisor to seek their assistance to identify specific classes I need to take, i.e., PowerPoint, Excel, etc.	Time to meet with supervisor. Time to take classes. Money for classes if not offered by HR	6 months to complete this phase. Will evaluate for additional technology needs.	Grades and/or comments from instructors from classes. Self evaluation of my computer skills Direct feedback from supervisor on improved computer skills	
I want to learn more about assessing staff performance including completing a comprehensive performance appraisal.	Attend OLTD class on performance appraisal skills. Attend OLTD classes on coaching, empowerment, and other motivational and supervisory classes that are appropriate.	Time to attend classes.	6 months to complete learning objective	Ask supervisor to "evaluate" performance appraisal I have prepared in the past and provide department head a written overview of some of the things I learned in the classes that I took.	

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