

**NAME:**

Suzanne Supervisor

**DATE:**

2/2/2012

### PROFESSIONAL GOALS/MOTIVATIONS

What are my professional growth and career aspirations?  
How do I think these aspirations can best be met at Yale?

Professionally to build my effectiveness as a leader and manager of staff. Be seen as someone others want to work for – an attractor of talent if you will – by leveraging opportunities to develop, coach and grow my employees.

### TALENTS OR STRENGTHS TO USE MORE (3-5)

What are my talents and strengths?

As a manager I see my strengths as:

- Knowledgeable and experienced
- Fair and open-minded
- Comfortable taking charge
- Strong communications skills
- Lead by example

### DEVELOPMENT OPPORTUNITIES (1-2)

What knowledge or skills do I need to enhance?

Strengthen my leadership capabilities

by:

- Developing my coaching skills to get the best from my staff.
- Push myself to delegate more, rather than being the "chief problem solver" for staff.

### FOCUSED IDP OBJECTIVES AND ACTIONS STEPS

What development goals do I have for the next 12 months? The next five years?  
What specific actions can I take to achieve these goals?

Seek out and participate in training opportunity aimed at being a more effective coach by end of 2<sup>nd</sup> Qtr. Track and measure my own actions with employees throughout the 3<sup>rd</sup> and 4<sup>th</sup> Qtr.

Identify a "peer" coach to check in with and to support and help me stay focused on my efforts to adopt a coaching style more often.

Schedule 1:1 meetings with each staff member to obtain a better understanding of what they need from me as a coach – how can I help empower them to do their jobs better, what can I delegate to them to grow their capabilities.

schedule midyear check in to get their feedback.

**NEXT REVIEW MEETING DATE:** 6/15/2012

**NAME:**

Tom Franklin

**DATE:**

July 4, 2012

### PROFESSIONAL GOALS/MOTIVATIONS

What are my professional growth and career aspirations?  
How do I think these aspirations can best be met at Yale?

Become comfortable as more of a spokesperson for the Yale programs I work on. Prepare to be capable of moving from behind the scenes organizing into a more front facing role over the next year to two years.

### TALENTS OR STRENGTHS TO USE MORE (3-5)

What are my talents and strengths?

Good research skills, and very strong written communications skills. Capable of organizing and implementing key events for my program area. Able to keep several projects moving simultaneously, and lock down details appropriately.

### DEVELOPMENT OPPORTUNITIES (1-2)

What knowledge or skills do I need to enhance?

Gain experience and confidence at presenting and public speaking.

### FOCUSED IDP OBJECTIVES AND ACTIONS STEPS

What development goals do I have for the next 12 months? The next five years?  
What specific actions can I take to achieve these goals?

Over the course of this year -

- Join Toastmasters to develop comfort and skill at public speaking.
- Attend key events put on by my group with the intention of learning by observing and noting methods and approaches used by our public spokespersons. Set up brief meetings to discuss and learn how they prepare for and develop material before presenting - interview them for special techniques/approaches they use to be effective.
- Get on the agenda for at least one of our internal meetings each quarter and deliver a brief presentation on my research or project work. Meet with my manager to critique these presentations.

**NEXT REVIEW MEETING DATE:** CHECK IN SEPT. 12, 2012

**NAME:**

John Brown

**DATE:**

2/2/2012

### PROFESSIONAL GOALS/MOTIVATIONS

What are my professional growth and career aspirations?  
How do I think these aspirations can best be met at Yale?

I consider myself a dedicated professional and have worked at Yale for over 15 years. I like what I am doing, so am not currently looking for career advancement per se. I am interested in developing some technical skill, and in maximizing use of my talents to add value and contribute more fully to my department.

### TALENTS OR STRENGTHS TO USE MORE (3-5)

What are my talents and strengths?

- Thorough understanding of my department's mission and my areas of responsibility
- Significant knowledge base of departmental and Yale history, functioning, organization
- Excellent work ethic

### DEVELOPMENT OPPORTUNITIES (1-2)

What knowledge or skills do I need to enhance?

- Enhance my technical skills – become faster and more adept at creating good looking documents /presentations efficiently

### FOCUSED IDP OBJECTIVES AND ACTIONS STEPS

What development goals do I have for the next 12 months? The next five years?  
What specific actions can I take to achieve these goals?

- Pursue self-study and/or training to enhance my technical skills. Meet with a few colleagues whose work I admire to get ideas on improving my documents. Complete these actions during first half of year.
- Leverage organizational know-how and knowledge base by volunteering to lead project(s) and/or become a contributing member of department initiatives/committees during the year. Work with supervisor to identify appropriate opportunities. Serve on a least one project/committee during the year.
- Leverage experience and understanding of Yale by mentoring a newer employee within the department. Work with supervisor/colleagues to identify appropriate opportunity.

**NEXT REVIEW MEETING DATE:** 3/30/2012 CHECK IN RE: PROJECT/COMMITTEE OPTYS AND MENTORING

**NAME:**

Jane Doe

**DATE:**

2/2/2012

### PROFESSIONAL GOALS/MOTIVATIONS

What are my professional growth and career aspirations?  
How do I think these aspirations can best be met at Yale?

I'd like to be using my knowledge of accounting in a more senior role—maybe in 3–5 years. This could be at the manager level, where I could influence decision-making and contribute to better financial planning and budgeting processes across the University.

### TALENTS OR STRENGTHS TO USE MORE (3-5)

What are my talents and strengths?

- Accounting knowledge
- Ability to explain finance info to non-financial people
- Strong analytics
- Skilled at presenting data visually in a clear-compelling manner

### DEVELOPMENT OPPORTUNITIES (1-2)

What knowledge or skills do I need to enhance?

- Need experience managing people
- Learn how to effectively delegate

### FOCUSED IDP OBJECTIVES AND ACTIONS STEPS

What development goals do I have for the next 12 months? The next five years?  
What specific actions can I take to achieve these goals?

\*Present @ 2 or 3 key financial meetings—explain finance data or new processes to senior client managers or finance managers. I. D. these opportunities w/ my manager @ start of each Qtr.

First Qtr. Mtng. To be held by 3/31/12.

\*By April 30—create plan to delegate ongoing analysis of mine to more junior staff—set up sched. for before and after delegation meetings (plan ahead—then self critique)

\*By June 30—I.D. and study research delegation (BOOK, ARTICLE, COURSE)

\* ongoing thru fiscal yr.—meet monthly w/ my manager to review delegation challenges/progresses—get coaching

**NEXT REVIEW MEETING DATE:** 2/28/2012 CHECK IN