Hello and welcome to the third module in the Jerry Holmes Leadership Program mentor training series. In this module, we’ll discuss a key component of our program, the Leadership Development Plan. I’m the director, Kim Wolfinbarger.

In Module two, we discussed our leadership philosophy and the Leadership Capabilities framework. Our program is organized around 5 pillars: Personal Development, Interpersonal Relationships, Management and Teamwork, Leadership, and Intercultural Competence. Each pillar contains a set of leadership capabilities: skills and attributes we believe technical leaders should possess. While we cover several capabilities each year through our event programming, Holmes Leadership Associates also get to personalize their leadership development experience by creating an individual leadership development plan. Today, we’ll discuss the personal leadership development plan in detail and talk about how you can help your mentee reach their goals. If you’d like to review the capabilities associated with each pillar, you’ll find that information on our website.

At the beginning of the fall semester, each HLA creates a personal leadership development plan, called “LDP” for short. Using an online survey, they read about each capability and rate their own level of competence. There are four levels: Does Not Possess, Introductory, Intermediate, and Advanced. We use MIT’s definitions of each level; the descriptions below are modified only slightly from their Gordon Engineering Leadership Program Handbook. Let’s take a look at each level:

• Does Not Possess means ”I don’t know anything about this capability, or I’ve heard a little about it, or I don’t really see the value.”

• Introductory means “I know something about this capability. I can describe it and realize why I might need it, but I need to learn a lot more and practice to be good at it.”

• Intermediate means “I can understand and discuss this capability. I’m beginning to internalize these concepts, and I am actively practicing them. I need to learn and practice more in order to become proficient.”

• Advanced means “I know enough to explain and demonstrate this capability. I could coach someone else. I embrace this idea completely.”

Advanced, though, does not mean perfect. Just like sports, arts, or math, even at the Advanced level, more practice is always necessary. Leadership development is a continuous improvement process.

Now remember, the ratings are subjective and personal, so one person’s “Intermediate” may be another person’s “Advanced.” This is OK. Our goal is for each HLA to identify opportunities for personal growth. Once the student has completed ratings for each of the 26 capabilities, they choose three capabilities as their focus for the year. We call these “target capabilities.”

Here we have an example of a fictional student’s LDP. We’ll call this student Cameron. Cameron has chosen “Building Positive Relationships” as one of their target capabilities. Now for each target capability, in addition to listing an initial rating, they also need to provide the reasoning for that initial rating and a create a plan to develop that capability. As you can see on this slide, Cameron’s plan has some weaknesses. It is not SMART.

We encourage students to use the SMART goals process to help them set goals and develop an action plan. So, what do we mean by SMART? The acronym stands for Specific, Measurable, Action-oriented, Realistic, and Timely, or Time-bound, depending on how you apply the model. You can read more about SMART goals in Chapter 5 of your mentor’s guidebook. So how might a mentor help Cameron create a SMART plan for building positive relationships?

Cameron’s rationale is vague, and their plan lacks detail. What do they mean by “not a people person” and how are they are going to “be more approachable”? Having a plan that isn’t SMART, is not unusual. Over the years, we’ve found that students struggle with being specific about their goals and creating a realistic plan with action steps. This is a place where mentors can help.

Here is one example of a SMART action plan. Let’s say that you and Cameron decided to read a book together. Notice that all the steps listed on this table are specific actions and each one has a due date. You and Cameron should collaborate on selecting actions and setting due dates. As a mentor, you should not be dictating assignments. You should, however, help Cameron make sure that the tasks and the due dates are realistic. They should neither be ambitious nor too loose.

Now, how are these tasks going to be measured? The answer for a few of these is obvious. It’s easy to track to how much of the book you’ve read for example, but what about qualitative assessments? In this case, Cameron wants to become more approachable. That’s inherently a qualitative judgement. So how might Cameron know whether they’ve made progress? We suggest using a journal. Reflecting on behaviors and the outcomes will help Cameron more accurately assess what they are doing and why and the journal provides a good reference and accountability tool for use during midterm meetings. Over time, Cameron will have a record of what worked and what didn’t, and they can experiment with different approaches. Note that this plan isn’t completely fleshed out. It may not be realistic to build a full plan for each target capability at the beginning of the semester. So here, Cameron and their mentor decided to update the plan during their meeting on November 12th.

Defining goals clearly and establishing a road map for progress is essential, but just as essential is follow-up. We encourage the students to talk about their goals with their mentors early, but we also want mentors to check with students on their progress. Discussing their progress on the target capabilities should be a part of every mentor meeting.

As you help your mentee define their goals and create an action plan, keep the CATSU model in mind. We covered that in the first training module. CATSU, you’ll remember, stands for the key mentoring activities of Coaching, Advising, Teaching, Storytelling, and the catch-all term, Undefined. Helping your mentee create an action plan for their target capabilities falls under the Coaching and Advising portions of the model. When you’re helping the student identify their goals, you’ll use the Coaching skillset—asking curious and open-ended questions. Making the goals SMART will require skills from the Coaching and Advising skillsets. We’ll talk more about the Advising skillset in a future module. For now, just remember to exercise restraint. Don’t do all the work for the student and remember that your mentee is creative and resourceful.

HLAs rate themselves three times during the year: in October, in late January or early February, and in April. So, ask your mentee about their LDP at every meeting.

This focus on a leadership development plan is what distinguishes our mentorship program from other professional mentorship efforts. As a JHLP mentor, you’re not just giving advice about careers and coursework, you are guiding our Holmes Leadership Associates as they develop as leaders.

A partial list of resources for many of the capabilities is available on our webpage. Students have access to additional content through our course management system. We’re continually adding to this list and would love to know what materials and approaches you and your mentee are using.

That’s it for module three. Thank you for listening.

JHLP Leadership Philosophy and Capabilities: http://ou.edu/coe/student\_life/leadership/about/philosophy

JHLP Mentor Resources: http://ou.edu/coe/student\_life/leadership/hla/mentors