



New State CTE Director Leadership Program

Module 5: Leading Your Team to Success

Summer 2018

A Note from Advance CTE

Congratulations on reaching the end of our New State CTE Director Leadership Program!

Over the past 10 months, you have diligently unpacked key components of your state system, asked hard questions and made critical decisions that will position your state for future success. This progress, undoubtedly, was not painless, but neither is leadership. That's also why this final module is so important.

As a state leader of Career Technical Education (CTE), you must make important choices about how to maximize the resources and levers at your disposal to achieve your state's vision for CTE. While it's important to understand how to increase the quality of your state's programs of study and strengthen your data systems, it is just as critical to analyze the talent and skills of your staff to assemble the right team to help you implement your vision.

This module has two primary sections – how to “build your bench” of all-star staff and how to delegate effectively. No matter if you have been a leader in other capacities, even the most accomplished leader can always freshen up these core skills, and we hope you will find it useful as well.

The content for this module is a blend of Advance CTE's experience working with state CTE leaders and the expertise of The Management Center. You can find even more resources for managers and staff at <http://www.managementcenter.org/>.

As we close out this leadership program, we want to take a moment and thank you for the hard work you do each and every day. I hope that this program has helped to demonstrate how Advance CTE can be a thought partner and critical friend that is ready to work shoulder-to-shoulder with you to support and advance high quality CTE in your state. We look forward to continuing this work with you.

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How to Use the Modules

The New State Director Leadership Program is designed to fit the natural learning curve of new State CTE Directors as they explore their state CTE system as well as the policies and decisions that undergird it. To that end, Advance CTE has developed a 10-month curriculum with two in-person meetings, two webinars and intermittent optional phone calls to provide comprehensive supports to these new leaders. The program, with its curriculum, touchpoints and mentorship, is designed to allow new State Directors to access the support they need, when they need it.

This module is part of the 12-month curriculum that is designed to help you be inquisitive about your state's current "state of play," evaluate the responses and information you gather, see what gaps exist and determine if, how and when you may want to take action. By answering the guiding questions and adding data where appropriate, you will be able to better visualize both where you are currently and where you want to take your state system.

The modules are laid out to help you organize your thoughts and guide effective discussions with your mentor and Advance CTE staff who can help you consider and benchmark your findings, as well as provide resources, support and targeted technical assistance as you work your way through the modules.

Disclaimer: The modules do not constitute or replace legal advice. We encourage you to check with any relevant state and federal guidance and regulatory requirements to ensure compliance. Further, the examples listed within are not endorsements nor should be considered a comprehensive list.

This module, specifically, was informed by The Management Center's Management Workout, a self-paced curriculum to help managers improve their leadership skills.

Module Objectives & Pre-Module Survey

Module Objectives

This module is designed to help you be a successful and proactive manager and internal leader. While this module is by no means comprehensive, it is designed to help you get started by:

- Reviewing when and how to develop staff members;
- Exploring specific development techniques to use with staff, such as feedback, modeling and addressing performance issues;
- Mapping a plan to help staff develop a specific skill; and
- Breaking down how to delegate work effectively across your staff.

Pre-module Survey

To begin this module, please take this brief self-assessment, and choose the “Leadership” option:

<https://www.surveymonkey.com/r/NewSDpre-test>

Getting Started

Preparing for this Module

This module is different from the others because it is not about content. So, there is no policy or regulation to dig up. Instead, we will ask you to look at your staff – and yourself as a manager.

The module is broken into the following sections:

- Building Your Bench
- Delegating Effectively

To prepare for each section, we recommend the following:

Building Your Bench

- Complete the attached pre-reading (see Andrea’s email or [this link](#)) for “How to Develop People,” a five-page excerpt from *Change the World: The Nonprofit Manager’s Guide to Getting Results*

Delegating Effectively

- Complete the attached pre-reading (see Andrea’s email or [this link](#)) for “Chapter 2: Managing Specific Tasks,” an excerpt from *Change the World: The Nonprofit Manager’s Guide to Getting Results*

The Management Center

This module was developed with assistance from The Management Center and two sections from its 12-module *Management Workout* as well as the many free tools and resources available on its website:

<http://www.managementcenter.org/>



The Management Center is dedicated to helping leaders learn to run effective organizations to get better results. Previous clients have included state departments of education, small community non-profit organizations, and even Advance CTE. We send our staff and managers through the various in-person trainings offered by The Management Center and have incorporated many of their tools and techniques into our own work.

Section 1: Building Your Bench

Your state staff are essential team members in helping you not only carry out the duties of your office but in achieving your state's vision for CTE. No matter if you are an army of one, a few, or many, your role as State Director is to marshal the resources you need. In some cases, this might mean contracting with other agencies or organizations to help, which still requires that you ensure any contracted work is accurate and of high-quality, just as you would expect of someone who worked down the hall.

KEY READING: How to Develop People

If you haven't done so yet, skim the eight-page excerpt from The Management Center's *Change the World: The Nonprofit Manager's Guide to Getting Results* (excerpt found [here](#))

Building your bench can come in many forms. You need to understand your staff, set and help them achieve ambitious goals and hold them to high standards. When your expectations are not met, it's just as important to reflect and give thoughtful, candid feedback in real time to help your staff correct the course. Just important as it is to give feedback, leaders should also be receptive to receiving feedback. Having a process for feedback will be key to helping your team learn and grow together in service of your broader goals.

We also recognize that as managers working for state governments or systems, you most likely have established human resources rules around managing staff performance, which many even dictate how you must approach certain issues or evaluations. This section is not intended to circumvent any of those rules, but rather add additional tips and techniques to your existing toolbox. Additionally, unions and union-related issues are not addressed in this module given how these contexts may vary from state to state.

According to The Management Center, you should keep three principles in mind when deciding when to invest in staff:

1. **Invest in your best** – Identify your rising stars and help them grow for the greatest pay-off in energy and time spent
2. **Know what you can change and what you can't** – Understand that you are not a superhero. Acknowledging the strengths and realistic development areas of your staff is the best starting place for building a team that complements each other and is well-positioned to drive the work forward.
3. **Distinguish between development needs and serious performance issues** – Striking this balancing act may be hard, but in time you'll know when a staffer's performance requires support or a more direct intervention.

Developing People

Formal training programs can give your staff specific, concrete skills, but we know the impact of work-based learning for CTE learners and the same holds true for your staff. Employees grow the most when they have opportunities to stretch themselves in pursuit of meaningful goals and projects that are supported by coaching from a manager to help them throughout the process.

Simply giving your staff member a task that you know will stretch them is not enough to ensure that they will grow successfully. In the activity below, you'll see key techniques you can use to support your employee as they grow.

You may be wondering – but what about motivation? You can create the right environment to help people feel motivated, and if you have the right team assembled, you shouldn't have to spend a lot of time or energy dedicated to this. Providing meaningful work with real responsibility and helping them feel supported as they work toward ambitious goals are key roles that you can play as a manager. There may be times where you will need to remind them of the bigger picture or praise their progress along the way, but ultimately, showing you care goes a long way to helping sustain a person's motivation.

Giving Feedback

Feedback is tough both to give and receive. Let's be honest, there are few people who like doing it, and as a result, feedback is often avoided. The Management Center offers a great [worksheet](#) to help you think through how to give feedback. They recommend the SAW model:

- **Share** what you see
- **Ask** questions
- **Wrap-up** with next steps

Giving feedback gets easier if it's built into your regular work. Here are a few ways you can systematize feedback:

- Put a "feedback" or "lessons" bullet into your regular check-in form, so it becomes something that is always done from week to week.
- Add "debriefs" to your calendar at the beginning of a project to ensure you hold space for a feedback session at the end of all major projects. This can be a time to celebrate your staff members' accomplishments as well as capture lessons learned while it's still fresh.
- Implement "SAW" in your office culture and vocabulary to help institutionalize the practice throughout your staff.

Ultimately, giving and receiving feedback is best built upon relationships, credibility and trust. If feedback feels punitive or like a "gotcha" moment, it is harder to accept or digest but when someone feels like you're on their side, this process is much easier. To avoid the feeling of "gotcha" feedback, it's important that you as a manager practice recognizing good work when it happens and even solicit feedback yourself.

Activity 1: Development in Action – What Choices Would You Make?

With the three development principles in mind – invest in your best, know what you can change, and understanding performance versus development issues – let's break down some techniques you can use to build skills:

Naming the Issue	Be specific about issues that staff need to work on. Labeling the challenges will help you and your staff member develop this skill.
Articulating Key Principles	Sometimes what seems obvious to you isn't for a staff member. After naming the issue, be clear about how to address the issue.
Stretch Assignments	Assign staff with increased responsibility that allows them to apply new skills or use well-established skills at a higher level and help them grow by doing.

Introducing One Piece at a Time	New challenges can paralyze some staff. Use this technique to complement the stretch assignment concept by gradually adding responsibilities or tasks.
Modeling the Skill	Use the “I do, we do, you do” approach to help staffers learn a new skill or competency.
Giving Direct Feedback	Providing feedback to a staffer during a project’s development can be a powerful tool and can exist on a continuum of positive/encouraging to developmental to corrective.
Providing Additional Resources	Consider supplementing your staff’s development skills by encouraging self-directed learning through books, articles, workshops, etc.

Development in Action – What Choices Would You Make?

Review each scenario below. In each of the situations below, what development techniques would you use from the chart above? At what point, if any, would it make sense to treat the situation as a performance problem rather than a development need?

1. One of your program specialists has great curriculum development skills, but you’d like her to improve her in-person presentations.
2. You’ve heard some complaints about your staff member responsible for monitoring local grant recipients and how he interacts with them.
3. Your soft-spoken staffer is having trouble managing a contractor who is causing delays on an important project and so far he has hesitated push for a resolution.
4. A longtime staff member has shown resistance to your vision for CTE in the state, and does not use the agreed-upon language and values when making public presentations.

Activity 2: Staff Development Worksheet

Use this worksheet to plan a development strategy for a staff member whose skills you’d like to develop. You can access a blank copy of this worksheet in Appendix A.

I want to develop _____ in the following skill: _____

The ideal outcome of my development efforts would be: _____

Does development make sense in this case?

Are any of the following true:

- I’ve tried developing this person in the past but not seen significant improvement.

- I might be able to get this person to be okay at this skill, but I need someone who excels at it.
- I'm not able to invest the amount of time that would be needed to guide the staff member to where I need her to be.

If any of these are true, you will probably need to address the issue not as a development need, but as a serious performance problem.

Development Methods

I plan to use the following development methods (*check all that apply*):

Naming the issue and giving direct feedback. Specifically, I will: _____

Stretch assignments. Specifically, I will: _____

Structured doing (introducing one piece at a time, or "I do, we do, you do"). Specifically, I will: _____

Modeling the skill. Specifically, I will: _____

Providing additional resources. Specifically, I will: _____

I will meet with _____ on _____ to begin this work.

I will schedule a follow-up meeting on _____ to talk about progress.

.....

Other Helpful Resources

From Advance CTE:

In 2016, Vermont's State Director posed a question to the listserv about state CTE staffing levels. A similar question was posed about how CTE is governed in each state. You can check out the state responses to both requests [here](#).

A high-level summary of the state staffing request showed the average number of state CTE staff across the 47 states was 20.9 staff.

From The Management Center:

Roles and Goals: Create meaningful roles and set clear, measurable goals with your staff through these worksheets and templates to help establish success and progress.

Check-in Meetings: Structure successful check-in meetings using these tips.

Managing Managers: You likely manage staff who manage others. Successfully managing managers requires a different application of your own management skills.

Managing Up: Often, you will have your own supervisors who you will report to. Here are some tips to help you communicate your needs to your manager.

Retention Chart: Keep your star staff by using this simple chart.

Key Questions: Building Your Bench

Answer the questions below in the space provided. While these questions are all optional, we encourage you to capture your thoughts here so that you can easily refer back to them.

	Key Questions	State Response
Building Your Bench	What processes already exist in your office that enable staff to give and receive feedback both to individuals and for projects? How often are these mechanisms used and how effective are they?	
	How can staff give feedback to your office management currently? How often these mechanisms are used and how effective are they?	
	What policies are in place to provide staff with structured professional development opportunities?	
	Which of the techniques shared in this section appeal to you and why? How do you plan to implement them in your regular work?	

Section 2: Delegating Effectively

Delegating the work is key to managing effectively. Yet, no matter where you are in your career journey, this skill is one of constant development and needs to be adapted to fit each team that you lead. While it may sometimes feel easier to just do the work yourself, delegation is critical to building your team and ensuring you have the capacity you need to achieve your goals and statewide vision for CTE. With that in mind, this section will review the basics of delegating.

KEY READING: Managing Specific Tasks

If you haven't done so yet, read the chapter about delegation from The Management Center's *Change the World: The Nonprofit Manager's Guide to Getting Results* (chapter found [here](#))

Activity 1: Self-diagnostic

Before we dig into this section, let's review how delegation plays out currently in your office.

Circle the answers that best describe your delegation practices. (And be honest! This diagnostic is solely to inform your own thinking, and you're the only one who will see it.)

1. When I delegate responsibilities, the work usually comes back to me:
 - a. Partly as I had hoped
 - b. As I had hoped and by the deadline assigned
 - c. In poor shape or not at all
2. I often end up doing work myself because it's the only way I can be sure it will get done correctly.
 - a. True
 - b. False
3. Most of the guidance I give on a piece of work usually comes:
 - a. When I'm assigning the work later on
 - b. Once a piece of the work has been done that I can comment on
 - c. Once the work has been finished
4. It's usually clear who will play what role in a project – who ultimately owns it and is responsible for driving work forward, who should be consulted, who must approve it, and who is available to help with it.
 - a. Always
 - b. Usually
 - c. Sometimes
 - d. Rarely
5. I'm not always confident that I know how work is progressing and sometimes worry that my staff member and I might be on different pages.
 - a. True
 - b. False
 - c. True with some people but not all
6. At the end of check-in meetings with staff, I ask them to repeat back the key decisions and next steps before leaving the room.
 - a. Most of the time
 - b. Only if they proactively offer
 - c. Rarely
 - d. Never
7. I check in and ask to see a piece of the work before it's completed.

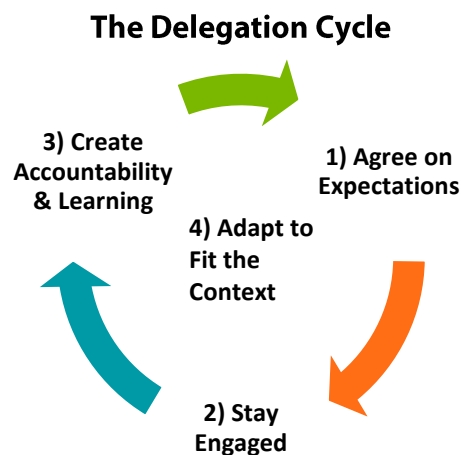
- a. Most of the time
 - b. Only if they proactively offer
 - c. Rarely
 - d. Never
8. When a project is over, I:
- a. Always talk over how it went with the staff member responsible for it
 - b. Try to make time to debrief but it doesn't always happen
 - c. Am usually on to the next thing

The Delegation Cycle

According to The Management Center, managers should be more hands-on in clearly communicating expectations for the outcomes of a given project or task to make sure they and their staff mutually understand how the work will proceed and what it should look like at the end. Doing this also creates accountability and learning opportunities at the end of a given project to help your staff grow. The Management Center calls this, "Guide more, do less."

In the chart below, you can see an illustration of the components of good delegation.

1. **Agree on expectations:** Ensure that your staff member understands what you want achieved. Consider using samples and templates to model and clarify your expectations.
2. **Stay engaged:** Make sure the work is on track to succeed before it's too late.
3. **Create accountability and learning:** Reinforce responsibility for good or bad results, and draw lessons for the future.



The fourth principle is an important one, and often is one that you may do intuitively – adapt your approach to fit the person and project. Consider the skill, will, difficulty and importance when assigning staff members to a project in order to set them – and you – up for success.

Now, let's share some tips and techniques you can use to help your staff manage their work, which will ultimately help you with delegating effectively across your team.

MOCHA: Not Just a Coffee Drink

The Management Center encourages organizations to use a shared vocabulary for the roles and expectations within a given project. The center's preferred framework is known as [MOCHA](#), which

helps give clarity around exactly what role each person is playing on a particular project or even on a broader, ongoing responsibility. This was adopted from the DARCI model, which stands for: Decider, Accountable, Responsible, Consulted, Informed.

Under the Management Center's version, MOCHA represents:

- M** Manager (assigns responsibility and holds owner accountable)
- O** Owner (overall responsibility for project; ensures that all the work gets done)
- C** Consulted (should be asked for input and/or needs to be kept in the loop)
- H** Helper (available to help do part of the work)
- A** Approver (signs off on decisions before they're final)

If your office or team is small, you may wish to combine some of these roles. Even at Advance CTE, we modified this framework to MOCA (Manager, Owner, Consulted, Assistant) by folding the Approver role into either the Manager or Consulted role based on the way we already carry out our work.

The Repeat-back

Communication is a two-way street, and is something managers often forget. Think back to a time you thought you were crystal-clear about your expectations for a given project, but when you received the final product from your staff, it looked vastly different than you expected. Disrupt the workplace-version of the childhood game "Telephone" by simply asking your staff to repeat back the expectations. You can do this verbally by simply asking at the end of a conversation, "Just to make sure we're on the same page, can you tell me what you're taking away from this?" or for more complex projects, consider asking the staff member to send a brief email summarizing the assignment.

Seeing an Early Slice of the Work

Once you've established clear expectations and you've ensured you and your staff are on the same page, it's important to continue to check on the progress of the task or project you've assigned. Consider using the management technique of reviewing slices of the work. Seeing a small sample of the whole project can help your staff avoid putting substantial energy into a project that may be unintentionally going in a very different direction.

Keep Ownership Where It Belongs – with Your Staff

How many times have you delegated responsibility but somehow the ownership transfers back to you? Perhaps staff are writing guidance for local administrators and during a check-in with staff, it's clear that the tone of the guidance isn't what you were hoping and your staff are frustrated. Resist the temptation to just re-write the guidance yourself. Encourage your staff to propose solutions themselves and empower them to fix the issues at hand.

Creating Accountability and Learning

This one is hard. There is a lot of work to be done every day and once a project gets across the finish line, you might feel the urgency to just keep moving to the next task. Resist that feeling, because creating accountability at the end of a process is a first step in setting expectations for future projects to come. Accountability can mean both rewarding and celebrating positive outcomes as well as discussing the things that can be improved. Consider building these accountability meetings at the very beginning of a project to make sure it is simply an mutual expectation of the entire team and not something that feels punitive because it is scheduled only after a project doesn't go well.

Delegation Challenges

The Management Center's *Management Workout* module on delegation provides the following scenarios. Review the following challenges and consider which of these happen in your office and how you might consider tackling them.

Challenge 1: It's not clear exactly what a project should look like.

Start by explaining that you're not entirely sure what the work should look like. By being transparent about this from the start, you'll prevent your staff member from struggling to understand what your vision is and instead you can focus on figuring out that vision together. From there, try to extract and articulate everything that you do know. For instance, you might say, "I know it needs to achieve X and Y, but we have to be careful in how we handle Z because that's a hot-button issue for some of our donors" or "It should have the same friendly but professional tone as the clean water website did."

From there, ask your staff member to brainstorm with you (because you might find that while you couldn't identify exactly what you need, your staff member can, or that it emerges through your discussion). Then, delegate the final figuring-out: Ask your staff member to think about everything you've discussed and come back to you with a proposal for how to move forward. (And don't be shy about making process suggestions here if you have them – "start by talking to Marta," "make sure to estimate costs," and so forth.)

Once you have a plan, check back in earlier than you normally would, to double-check that your staff member has a clear understanding of what success would look like, that you haven't changed your mind or had further thoughts in the meantime, and that you're aligned about the plan for tackling it.

Challenge 2: You can't find the right person to delegate a particular project.

First, figure out why. Is there a skills gap on your team? A job vacancy? A performance problem? Is this a one-time situation that's unlikely to occur again?

Sometimes it might make sense to simply do the work yourself, but make sure you understand why you ran into this situation, and whether it's something that needs to be addressed or not. (And of course, if you find yourself regularly hesitant to delegate to someone who really should be able to do the work, then you're probably facing a performance problem, not a delegation problem. If that's the case, you need to tackle that head-on; this is a signal that it needs your attention.)

Challenge 3: You're unsure if you should delegate something to an already busy person.

Just because someone is busy doesn't mean you can't delegate to them. It just means that you have to give them guidance on their priorities. Should the new project take priority over the others? Should they bump the others back? Let the person know how this fits in with the other items on their plate. And of course, be reasonable and realistic; don't expect someone to fit in more than can reasonably be done in a given period of time.

However, if the person is frequently too busy to take on new work, consider stepping back and reassessing their workload altogether. People need to have breathing room in their days so that they can go on vacation, take a sick day, have time to think about the bigger picture (not just put out fires), and stay sharp. (And if someone is frequently too busy to take on new work and you're confident that

that's not warranted by their actual workload, take a look at their fit for the role. Is the person overwhelmed because their skills or work habits aren't the right match for the role?)

Challenge 4: The ownership for driving the project forward keeps coming back to you.

Instead of allowing ownership to come back to you, keep it squarely on your staff member's plate. For instance, if your staff member tells you that she's not on track to meet her project deadline for rolling out the new implementation guidance, don't take back the work; instead say, "At our meeting tomorrow, let's talk about what how we can get this timeline back on track." Or, if you receive a draft of the implementation guidance with the wrong key points or framing, don't rewrite it; instead, talk with the staffer about what needs to be changed and ask her to send you a new draft.

One exception to keeping the ownership where it belongs: If it's a crisis, it often makes sense to intervene to ensure that you do get the results you need – but in that case, you'd then have a discussion with the staff member about why you had to do that.

Now, let's work through two activities designed to help you practice these delegation skills.

Activity 1: Delegation Role Play

Below are five scenarios you can use to practice your delegation and management techniques. Imagine how you would handle these situations, and consider doing these with another person, where one of you plays the manager and the other plays the staffer.

1. **No time to do it:** Staff member says -- "I don't really have time to do this and everything else that's on my plate right now."
2. **Unsure how to do it:** Staff member says -- "I'm not confident that I know how to do this. I'm not even sure where to start!"
3. **Unclear on what the manager wants:** Staff member says -- "It's not clear to me exactly what this should look like."
4. **Whoops:** As a staff member, do a repeat-back of this project and get some key details wrong.
5. **Resisting a check-in:** When your manager tries to set up a time to check in on the work, you say, "Oh, I'm sure it'll go smoothly. I'll just get it to you once I'm finished rather than bothering with a piece of it partway through."

Activity 2: Delegation Worksheet

A clean copy of this worksheet can be found in Appendix B.

I am assigning _____ the responsibility of _____.

Agree on Expectations

1. WHAT does success look like on this assignment?

2. WHEN is the project due? How does this fit with other priorities?

3. WHERE might the staff member go for resources?

4. WHY does this work matter, and why is this staff person the one to make it happen?

5. WHO else should be involved?

The MOCHA for this task is:

Manager	Owner	Consulted	Helper	Approver

6. Tips on HOW to do it (if any): _____

7. How will you make sure you and your staffer are aligned on key points and next steps?

verbal or written repeat-back project plan other: _____

Stay Engaged

1. What specific deliverables or activities will you want to review or see in action to monitor progress?

Early on: Midstream: On the back end:

Adapt Your Approach

1. Given the difficulty and importance of the task and my staff member's skill and will for this task, my approach should generally be:

- a. Very hands-on
- b. Moderately hands-on
- c. Relatively hands-off

Key Questions: Delegating Effectively

Answer the questions below in the space provided. While these questions are all optional, we encourage you to capture your thoughts here so that you can easily refer back to them.

	Key Questions	State Response
Delegating Effectively	Think back to a time when you delegated work and when it was completed, it wasn't what you anticipated. What could you have done differently in the delegation process to prevent that, if anything?	
	Think back to a time when you delegated work and it was completely successfully. How did the way you delegated it contribute to that success?	
	In reviewing range of work you do each day, what are three tasks you can start delegating to your staff?	
	Name two techniques you plan to start using with your staff to empower them in their work.	

Final Reflections & Next Steps

Post-Module Survey

Please take this brief post-module assessment to let us know what you learned and how we can help:
<https://www.surveymonkey.com/r/NewSDpost-test>

Next Steps

It's important to keep the momentum of what you have unpacked through this module. Most importantly, it is our sincerest hope that you already have a list of concrete actions you will take action as a result of this module. Some may be small steps or changes you can make today while others may require you to build a cohesive plan for more dramatic shifts in the future. Just know that we at Advance CTE stand ready to help as critical friends, content experts, and providers of professional development and technical assistance.

Appendix A: Development Worksheet

Use this worksheet to plan a development strategy for a staff member whose skills you'd like to develop.

I want to develop _____ in the following skill: _____

The ideal outcome of my development efforts would be: _____

Does development make sense in this case?

Are any of the following true:

- I've tried developing this person in the past but not seen significant improvement.
- I might be able to get this person to be okay at this skill, but I need someone who excels at it.
- I'm not able to invest the amount of time that would be needed to guide the staff member to where I need her to be.

If any of these are true, you will probably need to address the issue not as a development need, but as a serious performance problem.

Development Methods

I plan to use the following development methods (*check all that apply*):

Naming the issue and giving direct feedback. Specifically, I will: _____

Stretch assignments. Specifically, I will: _____

Structured doing (introducing one piece at a time, or "I do, we do, you do"). Specifically, I will:

Modeling the skill. Specifically, I will: _____

Providing additional resources. Specifically, I will: _____

I will meet with _____ on _____ to begin this work.

I will schedule a follow-up meeting on _____ to talk about progress.

Appendix B: Delegation Worksheet

I am assigning _____ the responsibility of _____.

Agree on Expectations

8. WHAT does success look like on this assignment?

9. WHEN is the project due? How does this fit with other priorities?

10. WHERE might the staff member go for resources?

11. WHY does this work matter, and why is this staff person the one to make it happen?

12. WHO else should be involved?

The MOCHA for this task is:

Manager	Owner	Consulted	Helper	Approver

13. Tips on HOW to do it (if any): _____

14. How will you make sure you and your staffer are aligned on key points and next steps?

verbal or written repeat-back project plan other: _____

Stay Engaged

2. What specific deliverables or activities will you want to review or see in action to monitor progress?

Early on: Midstream: On the back end:

Adapt Your Approach

2. Given the difficulty and importance of the task and my staff member's skill and will for this task, my approach should generally be:

- a. Very hands-on
- b. Moderately hands-on
- c. Relatively hands-off