

# INDIVIDUAL DEVELOPMENT: DEVELOPING LEARNING PLANS

1-F



Job Performance  
Situation 1:  
Orienting New  
Staff

HEAD START  
*MOVING AHEAD*  
COMPETENCY-BASED TRAINING PROGRAM



Developed under delivery order number 105-97-2043, the Head Start Bureau, Administration for Children and Families, U.S. Department of Health and Human Services. Revised in 2000 by the American Institutes for Research under contract number 105-94-2020

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## REFERENCE PAGE

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This activity addresses skill competencies in *developing a learning plan*. Participants will learn how to assess the skills and knowledge needed for a job and how to assist staff in assessing their own training needs. They will use adult learning principles to select appropriate training resources. Finally, they will learn how to assist new employees in developing a learning plan.

Related skill activities include 1–C, Staff Development and Training: New Staff Orientations; 1–D, Staff Development and Training: Leading a Guided Discussion; and 1–E, Individual Development: Giving Feedback.

*Sources. Linking Our Voices*. 1996. Washington, DC: U.S. Department of Health and Human Services. *Head Start Social Services Training Manual*. 1990. Washington, DC: U.S. Department of Health and Human Services. *Teams at Work: A Guide for Creating, Implementing and Assessing Teams*. 1990. Developed for Department of Health and Human Services Organization and Employee Development Group by Human Technology Group, Human Technology, Inc., McLean, VA. *Developing a Head Start Training Plan*. 1995. Washington, DC: U.S. Department of Health and Human Services. Training Guides for the Head Start Learning Community, *Setting the Stage: Including Children with Disabilities in Head Start*. 1997. Washington, DC: U.S. Department of Health and Human Services.

# OVERVIEW

## Developing Learning Plans

**Outcomes.** Participants who complete this activity will be able to

- identify four types of skills and knowledge needed for a specific position
- assist staff in assessing their own training needs through a questionnaire and an interview
- offer information on Head Start staff-development resources
- conduct a staff-development interview
- develop an individualized learning plan with goals, learning strategies, and action steps
- identify ways to support a staff-development culture in their organization

**Materials.** Newsprint and markers; The Head Start Performance Standards

### Components

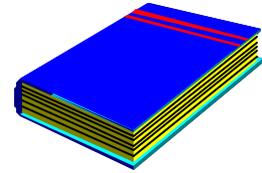
This activity can be done by one person, an informal group, or a formal workshop. We have provided suggested times, but participants and facilitators may wish to adjust these to their own timetables.

Step 1. Background Reading: Coaching Employees in Developing a Learning Plan	15 min.
Handouts: Sample Skill and Knowledge Grid for federal Head Start Program Specialists Individual Staff Development Needs Assessment	25 min.
Step 2. Worksheet: Assessing the Training Needs of New Staff	20 min.
Step 3. Background Reading: Conducting a Learning Plan Meeting	15 min.
Handout: Learning Styles Checklist	5 min.
Step 4. Worksheet: Developing a Learning Plan	40 min.
Step 5. Summary	10 min.
Suggested total time	2 hrs. 10 min.

This activity contains 23 pages.

# STEP 1. BACKGROUND READING: COACHING EMPLOYEES IN DEVELOPING A LEARNING PLAN

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Suggested time: 15 min.

## I. WHY A LEARNING PLAN?

A well-designed and effectively delivered employee orientation program is a good way to ground new staff and begin to integrate them into an organization. Frequently, however, after employees are grounded in their new jobs, they or their supervisors realize that they need more targeted training to perform comfortably in their new positions. One common response to this situation is for supervisors to provide staff-development coaching for new staff. Although in many cases the supervisor is the ideal coach, the supervisor may appoint another experienced staff person to function as the coach.

The coach can play many roles with the new employee: she can answer questions, help guide the employee through specific job tasks, and act as a sounding board. Often the coach assists the new employee in acquiring new skills and knowledge by helping her develop a *learning plan*. During the process of developing such a plan, the employee and coach

- assess the employee's skills and knowledge as they relate to specific job requirements
- identify on-the-job and other training experiences that will help her acquire the additional skills and knowledge she needs to be successful
- agree upon action steps and a timetable

Involving employees in developing learning plans during orientation is consistent with good management practices. It goes a long way toward enhancing the new employee's sense of connection and commitment to the organization, and provides proof of the organization's interest in the employee's development and potential for career mobility. It also emphasizes employees' role in their own development and can reduce the likelihood of future performance problems.

Learning plans are also consistent with the spirit of the revised Head Start Program Performance Standards. These standards require that "grantee and delegate agencies, at a minimum, perform annual performance reviews of each Early Head Start and Head Start staff member and use the results of these reviews to identify staff training and professional development needs, modify

staff performance agreements, as necessary, and assist each staff member in improving his or her skills and professional competencies.”<sup>1</sup>

## What Does a Learning Plan Look Like?

In some organizations a learning plan is a formal document that is placed in the employee’s personnel file along with performance appraisals and other official documents. Other organizations consider it part of the performance appraisal. In most organizations it is an informal agreement between the coach and the employee, designed jointly by them. It guides training and other staff-development experiences that the employee will pursue during a designated period of time. At a minimum, an individual learning plan includes

- training needs agreed to by the employee and coach
- goals and objectives developed to address these needs
- action steps that the employee will take to meet these goals and objectives
- resources available within the organization to support the employee

Clearly, the coach has a role in initiating and guiding the process and in helping employees assess their needs. The coach also plays a critical role in helping the employee to develop action steps and in identifying available resources.

## II. PREPARING FOR A LEARNING PLAN MEETING

### Understanding New Employees as Adult Learners

As a coach, keep a number of points in mind when you engage new staff in developing learning plans. New employees are not blank slates: they arrive at their new positions with unique sets of skills and with knowledge that grew out of their own employment, educational, and personal histories. Learning theory tells us that adults learn best when they

- integrate new ideas with what they already know if they are ultimately to make use of the information<sup>2</sup>
- plan and evaluate their own learning<sup>3</sup>
- take responsibility for their own learning by identifying what they want to learn and how they learn best
- are challenged and trusted to solve problems and develop their own ideas
- are involved in varied activities that reflect their preferred learning style

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<sup>1</sup> Head Start Program Performance Standards, 1304.52 (i).

<sup>2</sup> Adapted from *Linking Our Voices Facilitator’s Manual*. 1996. Washington, DC: U.S. Department of Health and Human Services, p. 12.

<sup>3</sup> Adapted from *Head Start Social Services Training Manual*. 1990. Washington, DC: U.S. Department of Health and Human Services, p. 9.

Therefore, a successful learning plan recognizes and builds on the skills and knowledge that the employee brings to the job.

The following chart contains brief profiles of four hypothetical Head Start employees: two new staff from a local grantee agency and two new federal staff. We will use these employees to illustrate key points throughout this activity. As you prepare to coach your own new employees, it may be helpful for you to create your own profiles.

<b>Local Grantee Staff</b>	<b>Federal Staff</b>
<p><i>John</i> has recently been hired as a family services manager. He holds an MSW, and before joining La Paloma Head Start, he was a social worker with a local mental health organization. The references you interviewed as part of the hiring process said that he has excellent interpersonal skills and understands the issues facing children and families in your community. He is new to Head Start, however, and has never held a management position before. He is thrilled that the family workers seem to like him: they ask him to meet with the families that are a challenge to them.</p>	<p><i>Carlos</i> is a 25-year federal employee. He has just received a lateral transfer from the Office of Family Assistance (OFA) to Head Start. His most recent job at OFA was to monitor and provide guidance to a number of demonstration projects within the states aimed at supporting welfare reform efforts. His new job at Head Start will require that he perform similar monitoring tasks with the local Head Start grantees in his region. Carlos is totally unfamiliar with Head Start except for information he picked up during joint meetings with Head Start staff while he was at OFA. For years he has listened to tales about onsite program reviews but has never participated in one. Whenever you suggest that it is time for him to plan for his first review, Carlos changes the subject.</p>

**Lori** was recently promoted to the position of child development services manager. She has worked in La Paloma for five years, as a teacher for three years and as a center manager for two years. In her previous position, she demonstrated strong supervision skills. Her master's degree in early childhood education provides her with a sound knowledge of child development. In her new role, she will need to manage partnerships with several local education agencies in your service area. She has no experience in working with outside organizations and seems to be nervous when she makes a presentation before the entire Head Start staff.

**Brenda** has worked in the Atlanta regional office of Head Start for two and a half years as an administrative assistant, while working on her master's degree in public administration. She completed her degree and recently received a promotion to the position of program specialist. Shortly after her promotion, Brenda relocated to another federal office because of a change in her husband's job. She is now working with a new Head Start unit, with a new supervisor and new co-workers. During her years as an AA she learned a great deal about Head Start. She even occasionally volunteered for special activities at the Head Start center in her community. Since her hiring, several program specialists have commented about Brenda's lack of knowledge about Head Start budgets.

### Assessing Training Needs: The Supervisor's View

Because they are new to the organization, employees like John, Lori, Brenda, and Carlos often need assistance in defining the requirements for functioning effectively in their new position. The supervisor can help them by cataloging the requisite skills and knowledge on a list or chart. These typically fall into four broad categories:<sup>4</sup>

**Core Team Skills.** A large part of the work of Head Start employees, whether they are federal staff or local program staff, involves working with others in a team context. Local programs have management teams, case coordination (case management) teams, classroom teams, and so on. In addition to participating in teams and work groups within their offices, most federal staff are responsible for pulling together and managing program monitoring teams. To work effectively in a team context, employees require skills in listening, giving and receiving feedback, resolving conflict, participating in meetings, problem solving, and decision-making to work effectively in a team context.

**Leadership Skills.** Often when we think of leadership skills, we think of those serving in leadership functions—team leaders, managers, coaches. They require

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<sup>4</sup> Adapted from *Teams at Work: A Guide for Creating, Implementing and Assessing Teams*. Developed for Department of Health and Human Services Organization and Employee Development Group by Human Technology, Inc., McLean, VA, July 1997.

skills in guiding and supporting teams, supervising, and strategic (long-term) and operational (short-term) planning. In Head Start, however, other kinds of workers need leadership skills. For example, family workers and teachers frequently play a leadership role in working with parents.

**Technical Skills.** New staff often require skills that are technical in nature. Federal program specialists, for example, need to be able to review a grantee budget, while grantee teachers may need training in the organization's method of developing lesson plans.

**Administrative Skills.** If they weren't covered during the orientation process, new employees will need to develop pertinent skills in administrative tasks, such as scheduling work and vacation time and completing travel forms.

In developing this composite of required skills, the supervisor should consider

- the responsibilities outlined in the employee's job description. If the job description doesn't provide enough information, consider the functions performed by the employee's predecessor or by others who hold the same type of position.
- the changing needs of the organization. Where is the program headed? Will the organization need new skills to meet its strategic goals?

The Handout that follows this reading provides a grid for listing the knowledge and skills needed by federal program specialists.

Once the supervisor has completed a grid for the new employee, he can begin to identify the areas in which the employee will benefit from training and other staff-development experiences. These assessments do not determine the final learning plan, but provide a basis for a true dialogue with the employee. In making the initial determinations, the supervisor should consider

- the skills and knowledge that the employee brings from past employment experiences. For example, the La Paloma staff development coach needs to consider John's lack of supervisory experience and Lori's strong supervisory track record.
- her own initial formal or informal observation of the employee's performance of these skills. For example, Carlos's avoidance of the onsite review and Lori's nervousness during her full-staff presentation may point to possible training needs.

- feedback received from colleagues about the employee’s skill level. For example, the federal staff-development coach will want to explore the feedback received about Brenda’s lack of budgeting skills.
- The employee’s own assessment of her staff-development needs.

### Assessing Skills: The Employee’s Role

The supervisor and the employee need to engage in a true give-and-take about the employee’s training needs, and this means that the employee also needs to prepare for the discussion. Employees need to reflect upon their own training needs before the conversation. Supervisors can help employees do this by sharing with them the Individual Staff Development Needs Assessment Handout (the second handout after this reading). The supervisor might also share the skill and knowledge list that he prepared for the position (without the preliminary assessment data). Head Start employees such as nurses, teachers with a CDA, or social workers who require special periodic training to maintain their professional certification or license may wish to explore the availability and cost of the required trainings before meeting with their supervisor.

### Identifying Training Resources

As you prepare for the learning plan meeting, consider the kinds of staff-development strategies that are available for your new employee. When planning for training, most managers and employees automatically think about workshops and conferences. Many other effective self-development strategies can be built into an employee’s learning plan, including<sup>5</sup>

- lectures
- self-study
- college course
- shadowing
- peer tutoring and consultation
- observation of other programs
- coaching and mentoring
- on-the-job training
- video presentations
- satellite distance learning
- discussions
- role playing
- practical exercises

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<sup>5</sup> *Developing a Head Start Training Plan*. 1995. Washington, DC: U.S. Department of Health and Human Services, p. 3.

- group workshops

Local Head Start programs and federal staff have a wealth of training resources that can be used for many of these strategies. What follows is a partial list of these resources.

*The Training Guides for the Head Start Learning Community* provide direction on conducting workshops, discussions, role plays, and simulations in nearly all areas of program operation. The Training Matrix that accompanies this set of over 40 guides can be used to identify training activities for specific topics. Staff from your region's Head Start Quality Improvement Center and Disabilities Services Quality Resource Center can also advise you on ways in which these guides can meet your needs.

*Head Start video training packages* cover a variety of topics, including child development services, parent involvement, mental health, and the home-based option. The videos can be used by themselves in workshops, or as the basis for guided discussions. Copies of each video have been sent to every Head Start program. They can also be ordered for free or at a nominal charge.

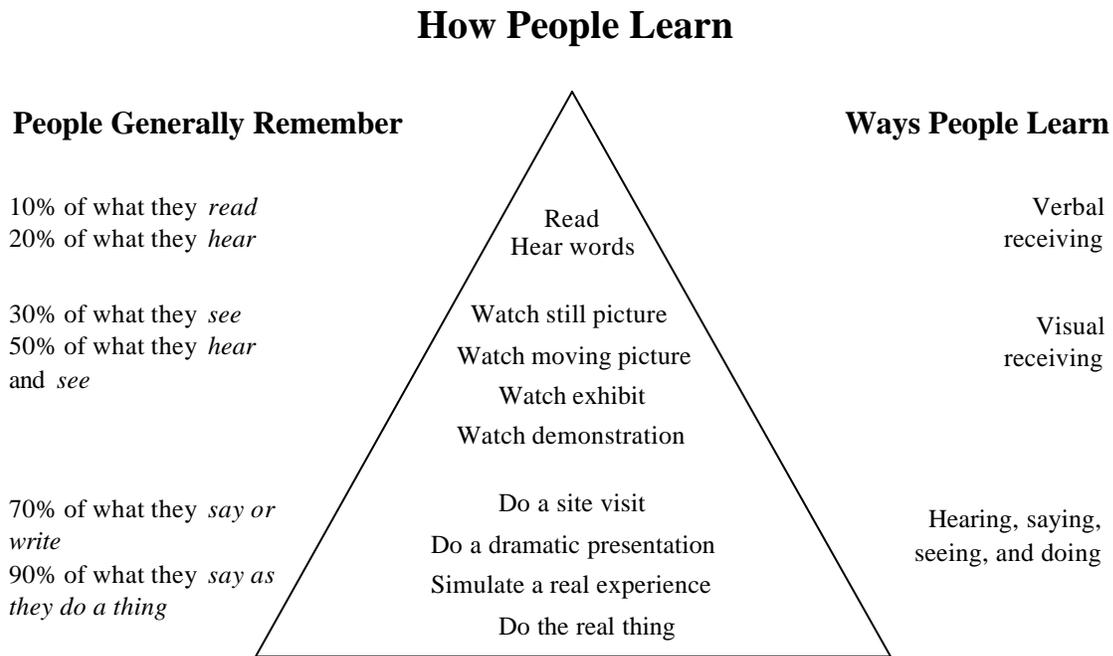
*Other internal resources* often provide the most effective and cost-efficient strategies. Within your own organization staff have the opportunity to observe others; to practice skills on their own, assisted by an observer who provides feedback; or to participate in guided discussions or peer support groups. If an appropriate mentor is not available within the program, the coach may be able to locate a mentor in a neighboring Head Start program.

*Local resources* provided by organizations like the Red Cross and United Way offer free or low-cost training experience for your staff.

*Workshops and conferences* are sponsored by Head Start Associations, Quality Improvement Centers, Disabilities Service Quality Improvement Centers, and other Head Start groups in each region. Excellent staff-development conferences are also offered by organizations whose missions are compatible with the mission of Head Start, such as the National Association for the Education of Young Children, the Family Resource Coalition, and the Children's Defense Fund.

As we select training strategies, it is important to reflect upon what we know about how adults learn. Each individual has her own preferred learning style, but adult learning theory tells us that "...those methods which promote **active**

participation are preferred by the majority of adults.”<sup>6</sup> The following adaptation of Edgar Dale’s Cone of Experience (1969)<sup>7</sup> illustrates this point.



Dale’s Cone shows us that adults generally remember the things that they say, write, or do better than things they simply read, hear, or see. Clearly, coaches need to actively engage their new staff in learning!

- When possible, select or provide workshops that actively involve the participant through a discussion or a simulation rather than just a lecture.
- Encourage learners to take notes on lectures they attend and to share key points with you or other staff.
- Provide learners with an opportunity to debrief following a lecture, video, performance observation, or reading assignment (see the Guided Discussion Technique described in 1–D, Development and Training: Leading a Guided Discussion).
- Provide opportunities for learners to practice new skills under the guidance and observation of a coach who gives honest feedback.

<sup>6</sup> *Linking Our Voices Facilitator’s Manual*. 1996. U.S. Department of Health and Human Services. Administration for Children and Families, p. 11.

<sup>7</sup> *Ibid.*, p. 12.



# HANDOUT: SAMPLE SKILL AND KNOWLEDGE GRID FOR FEDERAL HEAD START PROGRAM SPECIALISTS

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Suggested time: 10 min.

**Skills and Knowledge Needed<sup>8</sup>**  
(Please note: skills and knowledge are listed only once  
but may apply to more than one category)

	Previous Training or Experience	Demonstrated Skills and Knowledge	Additional Training Needed
<b>Team Skills and Knowledge</b> <ul style="list-style-type: none"> <li>▪ Listening</li> <li>▪ Giving and receiving feedback</li> <li>▪ Conflict resolution</li> <li>▪ Decision-making</li> </ul>			
<b>Leadership Skills and Knowledge</b> <ul style="list-style-type: none"> <li>▪ Delegation</li> <li>▪ Supervision (of review teams)</li> <li>▪ Group facilitation</li> <li>▪ Individual development</li> <li>▪ Career development knowledge</li> </ul>			
<b>Technical Skills and Knowledge</b> <ul style="list-style-type: none"> <li>▪ Knowledge of Head Start history, values, and regulations</li> <li><b>Funding</b> <ul style="list-style-type: none"> <li>— Data analysis skills</li> <li>— Planning skills</li> <li>— Cost-benefit analysis</li> <li>— Negotiation skills</li> </ul> </li> <li><b>Ongoing Monitoring</b> <ul style="list-style-type: none"> <li>— Knowledge of human resources</li> <li>— Knowledge of organizational behavior</li> <li>— Evaluation skills</li> </ul> </li> <li><b>Program Reviewing</b> <ul style="list-style-type: none"> <li>— Pre-review planning</li> <li>— Interviewing and questioning</li> <li>— Performance observation</li> <li>— Team meeting facilitation</li> <li>— Understanding of multiple modes of inquiry</li> </ul> </li> </ul>			

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<sup>8</sup> Adapted from a chart prepared by the Federal Staff and Staff Development Work Group.

	<b>Previous Training or Experience</b>	<b>Demonstrated Skills and Knowledge</b>	<b>Additional Training Needed</b>
<ul style="list-style-type: none"> <li>— Understanding of systems support services</li> <li>— Writing skills</li> <li>— Understanding the essential elements of a finding and knowledge of HSMTS</li> </ul> <p><b><i>Serving as a Spokesperson</i></b></p> <ul style="list-style-type: none"> <li>— Presentation Skills</li> </ul> <p><b><i>Training</i></b></p> <ul style="list-style-type: none"> <li>— Knowledge of adult learning principles</li> <li>— Training and development techniques</li> <li>— Presentation skills</li> </ul>			
<p><b><i>Administrative Skills</i></b></p> <ul style="list-style-type: none"> <li>▪ Computer skills <ul style="list-style-type: none"> <li>— Word processing, E-mail, Head Start software</li> </ul> </li> <li>▪ Records management</li> <li>▪ Knowledge of travel policy</li> <li>▪ Other</li> </ul>			

# HANDOUT: INDIVIDUAL STAFF DEVELOPMENT NEEDS ASSESSMENT



Suggested time: 15 min.

## INDIVIDUAL STAFF DEVELOPMENT NEEDS ASSESSMENT<sup>9</sup>

This form can be completed by a staff member or used as a guide in conducting interviews with staff. What is revealed becomes an important element of the Head Start training planning process.

1. What skills do you believe are necessary to do your job?

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2. Are you comfortable performing your current job? What do you feel you do well?

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3. What, if anything, is frustrating or difficult about your job? Can you describe why?

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4. What additional knowledge and skills would be helpful in your job?

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5. What areas would you like to improve in your job performance? Do you have ideas about how to make these improvements?

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6. What type of training do you prefer (e.g., lectures, self-study, group workshops, coaching, peer tutoring)?

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7. What are your short-term and long-term goals regarding your work with Head Start? What would you like to be doing in three years?

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<sup>9</sup> Adapted from *Developing a Head Start Training Plan: Worksheets*. 1995. Washington DC: U.S. Department of Health and Human Services, p. 49.

Other comments:

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Supervisor comments:

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## STEP 2. WORKSHEET: ASSESSING THE TRAINING NEEDS OF NEW STAFF

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Suggested time: 20 min.

**Purpose:** To provide participants with an opportunity to do an initial assessment of training needs for hypothetical staff members.

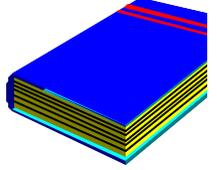
**Part I (10 min.)** Using the Sample Skill and Knowledge Grid for Federal Head Start Program Specialists as a model, complete the Skills and Knowledge column on the grid below for a grantee family services manager. You may wish to consult Subpart C, sections 1304.40 and 1304.41 of the Head Start Program Performance Standards concerning the functions that family service managers oversee. You can choose to complete the grid for a position in your own organization.

	<b>Previous Training or Experience</b>	<b>Demonstrated Skills and Knowledge</b>	<b>Additional Training Needed</b>
<b>Knowledge</b>			
<b>s and Knowledge</b>			
<b>and Knowledge</b>			
<b>Skills</b>			

**Part II (10 min.)** Compare grids within your group. Discuss the differences.

# STEP 3. BACKGROUND READING: CONDUCTING A LEARNING PLAN MEETING

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Suggested time: 15 min.

**Directions:** Study the following reading. Feel free to highlight sections or make notes in the margins.

## I. CONDUCTING A LEARNING PLAN MEETING

Now that the coach has defined and analyzed the skills that the employee needs to perform the job satisfactorily, she is ready to begin a conversation with the employee about training needs. Like any other good interview, this conversation should have three phases: initial, exploration, and closing.<sup>10</sup> It will help to conduct the meeting in a congenial setting, away from noise, distractions, and concerns about privacy and confidentiality.

### The Learning Plan Meeting

**Initial Phase.** The first few minutes of a learning plan meeting can set the tone for the entire meeting. The coach welcomes the employee and helps to prepare her for full participation in the process. The coach reiterates the purpose of the learning plan and answers questions. This is a good time to help reduce any anxiety that the employee may be experiencing. Employees may feel that admitting they need training will lower the coach's opinion of their competence or negatively affect future performance reviews.

It often helps to explain your organization's position on learning plans. ("This is a new idea that we are trying with all new employees." Or, "All new employees develop plans within three months." Or, "Every employee completes a plan as part of their annual performance review.") It also helps to share your own experience with this type of plan. ("Last year, when I took on a new assignment and needed training on computers, my supervisor and I worked out a plan for me to attend a special workshop to get the knowledge and skills I needed.")

**Exploration Phase.** The exploration phase is the heart of the interview. The coach and the employee have an open and honest discussion about the skills

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<sup>10</sup> Adapted from the *Head Start Social Services Training Manual*. 1990. p. 109.

and knowledge that the employee needs. They identify training sources that will meet the employee's learning style, and they develop the learning plan.

***Developing the list of training needs.*** First, the coach and the employee agree upon and prioritize the skills and knowledge that the employee needs to succeed. They compare their preliminary thoughts. Then they construct a list, making sure to prioritize the items.

***Selecting staff-development strategies.*** With the training needs and a preliminary time frame identified, the employee and the coach can begin to explore strategies for meeting these needs. Together, they should consider the following.

- The employee's learning style. How does the employee learn best? She may not have not given much thought to her preferred learning style. A checklist like the one that follows this reading can help you begin the conversation. Remember, Dale's Cone shows us that most people learn best when they are actively involved in the learning. If an employee prefers to learn by reading, listening to audio-tapes, or watching videos, consider following up with a guided discussion to help him integrate what he learned into his practice.
- Available resources. Is money available to pay for attendance at a conference, workshop, or college course? Are skilled staff willing and available to act as mentors or coaches? Can the region's Quality Improvement Centers support you in finding a mentor in a local program or recommend a program that the new employee can observe?
- Training needs of others. Do others in the organization have the same needs? Can learners be organized into study groups? Could you hold an in-house workshop? Can the employee join already scheduled workshops or other training venues?

***Developing the learning plan.*** If the plan is a formal part of your organization's staff-development system, you may be able to follow a specified format that includes goals, objectives, outcome statements, and strategies. The format may be tied to the overall agency training plan and may prompt a thought-provoking discussion between you and the employee.

If you are developing your own format, you can increase or limit its complexity according to your own needs and preferences. The purpose is to develop a tool that will work for you and your employee. A simple, easy-to-use plan will contain the following:

- Training goal. This is a broad, general statement of the skills or knowledge that the employee wants to acquire (e.g., to build “giving feedback” skills). Training goals can be related to current or future job responsibilities. For example, a local child development services manager may want to develop expertise in supervising infant-toddler staff because the program will be adding an Early Head Start option next year.
- Strategies for achieving each goal. Strategy statements should be based on the employee’s learning style. They should be expressed according to the **SMART** criteria, i.e., **S**pecific, **M**easurable, **A**chievable, related to available **R**esources, and **T**ime-bound (e.g., “to attend one workshop on feedback skills at the next Head Start conference,” or “to complete the *Moving Ahead* skill-building package on giving feedback before March 15”).
- Check-in times to assess progress. Schedule meetings to reassess the plan. The coach and employee can get together as part of ongoing regular supervision meetings or on a more-informal basis.

**Closing Phase.** Close the meeting thoughtfully. As the coach, you need to do the following:

- Summarize the agreements made during the discussion by reviewing the plan.
- Clarify responsibility for the next step. Will you or the employee locate the videotape for the guided discussion? Will you arrange for the employee to shadow an experienced staff person on a review? Lack of clarity about who is responsible for what can doom a well-thought-out plan.
- If you are not the employee’s supervisor, decide who will share the plan with her. The supervisor may need to make resources available and provide the employee with release time.
- Plan a follow-up meeting to review progress and reassess the strategies you’ve selected.

Close the meeting on a positive note by thanking the employee for his/her hard work and pledging your support throughout the life of the plan.

### III. OTHER THOUGHTS ON STAFF DEVELOPMENT

Learning plans are most effective when they are implemented within an organizational culture that supports staff development. As a coach you can help build such a culture in your organization in these ways:

- Encourage other managers to develop learning plans for their new employees and to integrate development planning in the performance review process.
- Support the use of individualized learning plans as the basis for your organization's overall training plan.
- Build a staff-development library that contains Head Start and other staff-development resources. Most Head Start resources are free. If space is not available to store the resources, keep an annotated list of resources on hand for employees to consult.
- Model lifelong learning and encourage others to do the same. Attend workshops, subscribe to and read professional journals, and host lunchtime discussion groups to stay current.



# HANDOUT: LEARNING STYLES CHECKLIST<sup>11</sup>

Suggested time: 5 min.

<input checked="" type="checkbox"/> <b>All That Apply</b>	
	<p><b>How do you think you can best learn what you want to learn? Check all that apply.</b></p> <p><input type="checkbox"/> Reading and writing on my own, supplemented by occasional sessions with my supervisor.</p> <p><input type="checkbox"/> Meeting with peers in an ongoing support group for discussing successes and concerns and creating solutions.</p> <p><input type="checkbox"/> Meeting with peers in an ongoing study group for reading articles, watching videos, and discussing professional development.</p> <p><input type="checkbox"/> Observing experienced staff members and peers practice new skills and having them observe me as I do the same.</p> <p><input type="checkbox"/> Attending other training sessions or taking a course at a nearby college.</p> <p><input type="checkbox"/> Receiving written notes and materials from my supervisor on topics that interest me.</p> <p><input type="checkbox"/> Other (please specify): _____</p>

<sup>11</sup> Training Guides for the Head Start Learning Community, *Setting the Stage: Including Children with Disabilities in Head Start*. 1997. Washington, DC: U.S. Department of Health and Human Services.



## STEP 4. WORKSHEET: DEVELOPING A LEARNING PLAN

Suggested time: 40 min.

**Purpose:** To provide participants with the opportunity to begin to develop a learning plan for an employee.

**Part I (20 min.)** Review the following staff profiles with a partner. Choose one of the two profiles or prepare a brief profile for an employee in your own organization. Use the profile to analyze training needs and develop a learning plan.

State Staff	Federal Staff
<p>John has recently been hired as a family services specialist at Head Start. He holds an MSW, and before joining Head Start, he was a social worker with a local health organization. The references you reviewed as part of the hiring process said that he has excellent interpersonal skills and understands the needs of children and families in your community. He is excited to work for Head Start, however, and has never held a supervisory position before. He is thrilled that the other staff members seem to like him: they ask him to help with the families that are a challenge to them.</p>	<p><i>Carlos</i> is a 25-year federal employee. He has just received a lateral transfer from the Office of Family Assistance (OFA) to Head Start. His most recent job at OFA was to monitor and provide guidance to a number of demonstration projects within the states aimed at supporting welfare reform efforts. His new job at Head Start will require that he perform similar monitoring tasks with the local Head Start grantees in his region. Carlos is totally unfamiliar with Head Start except for information he picked up during joint meetings with Head Start staff while he was at OFA. For years he has listened to tales about onsite program reviews but has never participated in one. Whenever you suggest that it is time for him to plan for his first review, Carlos changes the subject.</p>

Discuss the employee's training needs with your partner, then fill in the table that follows. If you are developing a plan for John, consider reviewing the grid you completed for the Step 2 Worksheet; it lists the types of skills and knowledge needed for John's job. If you have chosen Carlos, take a look at the Handout Sample Skill and Knowledge Grid for federal Head Start Program Specialists.

	<b>Previous Training or Experience</b>	<b>Demonstrated Skills and Knowledge</b>	<b>Additional Training Ne</b>
<b>Team Skills and Knowledge</b>			
<b>Leadership Skills and Knowledge</b>			
<b>Technical Skills and Knowledge</b>			
<b>Administrative Skills</b>			

Part II (20 min.) Using the grid you just filled in, develop one training goal that you and the employee might work on together.

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Develop at least one strategy to help the employee achieve his goal. Make sure that the strategy meets the **SMART** criteria: **S**pecific, **M**easurable, **A**chievable, related to available **R**esources, and **T**ime-bound.

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# STEP 5. SUMMARY

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Suggested time: 10 min.

## Key Points

- Reasons for learning plans
- Needs of adult learners
- Four types of skills employees need
- Head Start training resources
- Three parts of a learning plan meeting
- Learning styles and staff-development strategies
- Organizational culture and staff development

## Personal Review

What did you learn from this activity?

1. \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

2. \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

3. \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

How will you use your new knowledge and skills in your work?

1. \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

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2. \_\_\_\_\_

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3. \_\_\_\_\_

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What other things do you think you might need to learn in order to master the skill of developing learning plans?

1. \_\_\_\_\_

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2. \_\_\_\_\_

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3. \_\_\_\_\_

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