



Next Level Competencies and Career Action Planning

WACUBO BMI Track 4

Presented by

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Who's in the Room?

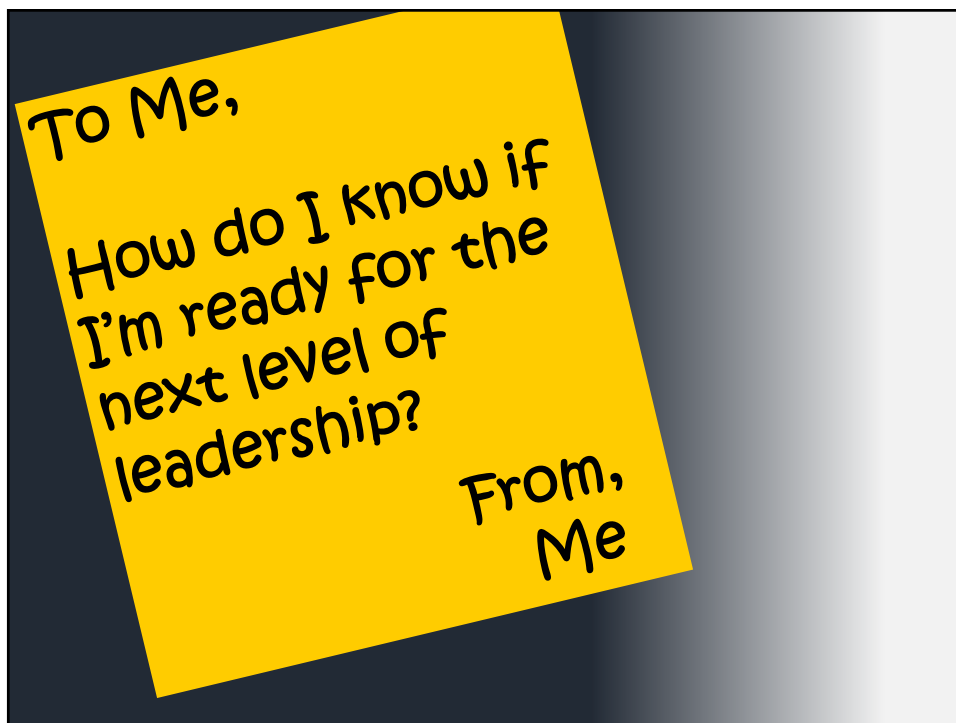
Briefly introduce yourself and tell everyone your

- Name
- Institution
- Past BMI experience

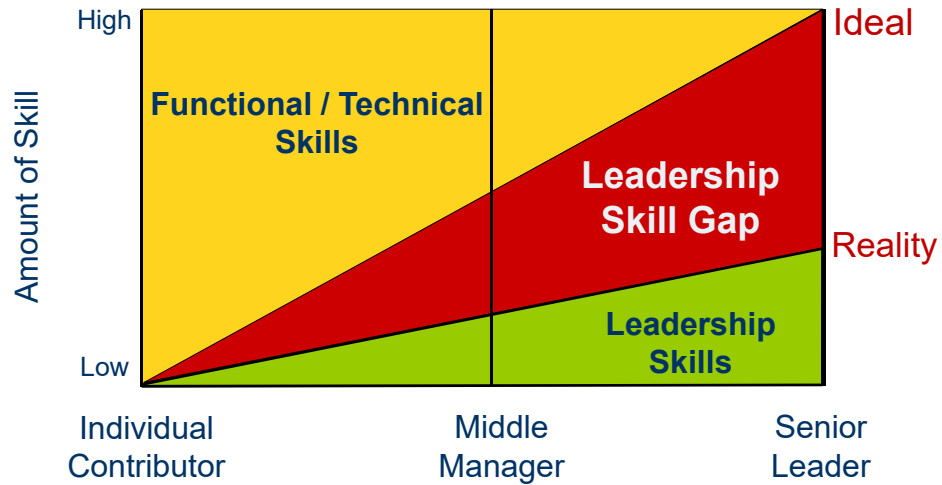


Learning Objectives

- Identify essential competencies and characteristics of effective CBOs/leaders
- Complete a self-assessment
- Identify five elements of a professional development plan
- Apply leadership and CBO competencies to your development plan that commits to immediate and long-term growth



The Leadership Conundrum



Competencies Self-Assessment

Current Profile of CBOs in Higher Education and Essential Responsibilities

NACUBO National Profile of Higher Education CBOs
2010, 2013 and 2016 Survey Reports



NACUBO 2016 National Profile of Higher Education CBOs

- Demographics
- Education
- Salary
- Career Paths and Succession Planning
- Skills Required to be Successful
- Areas of Responsibility

N = 713



NACUBO 2016 National Profile of Higher Education CBOs

Interactive activity



NACUBO 2016 National Profile of Higher Education CBOs

Interactive activity



NACUBO 2016 National Profile of Higher Education CBOs

Interactive activity



NACUBO 2016 National Profile of Higher Education CBOs

Interactive activity



NACUBO 2016 National Profile of Higher Education CBOs

Succession Planning: a process for identifying and developing people with potential to fill key leadership positions...

83%
of CBO's consider succession planning to be important

2.8%
of institutions have a formal succession plan for the CBO



NACUBO 2010 National Profile of Higher Education CBOs

TABLE 1 Most Important Job Skills

	Small institutions	Community colleges	Comprehensive universities	Research universities	TOTAL
Finance and budget	99%	94%	95%	91%	94%
Communications	54%	66%	64%	79%	60%
HR/staff management	46%	47%	42%	37%	43%
Leadership development	30%	28%	45%	44%	33%
Accounting	37%	30%	21%	13%	30%
Negotiating	17%	20%	23%	24%	19%

Source: 2010 Profile of Higher Education Chief Business and Financial Officers (NACUBO, July 2010)
 Note: Survey respondents were allowed to select up to three skills.



NACUBO 2016 National Profile of Higher Education CBOs

Area of Responsibility	2010	2013	2016
Budget/Financial Planning	96.7%	96.1%	98.5%
Controller	94.5%	96.5%	94.1%
Bursar	81.1%	81.9%	83.2%
Auxiliary Services	69.7%	73.4%	74.6%
Endowment/Investments	59.5%	63.6%	69.7%
Internal Audit	54.2%	50.5%	51.8%
Administrative Technology	47.8%	51.7%	50.5%
Public Safety	52.5%	51.9%	50.1%
Strategic Planning	45.2%	40.8%	46.1%
Academic Technology	31.3%	33.2%	35.5%



Essential Leadership and CBO Competencies



What are Competencies?

- Observable behaviors that make a difference
- Underlying characteristics that predict behavior in a variety of situations
- What superior performers do more often, more completely and consistently
- The “how” side of job performance



A Look at Visible Competencies

Visible

- Skills, knowledge
- Most easily developed
- What we see on resumes and in interviews

An example?

Intermediate Excel skills



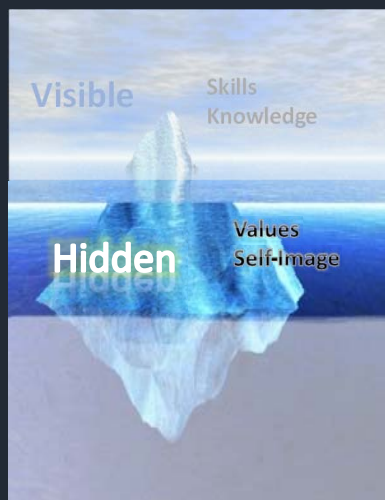
A Look at Hidden Competencies

Visible

- Skills
- Knowledge
- Most easily developed

Hidden (Under the Waterline)

- Self-image
- Values
- Usually more difficult to develop
- Usually more time consuming
- Enhanced contribution



A Look at the Hidden Core Competencies

Visible

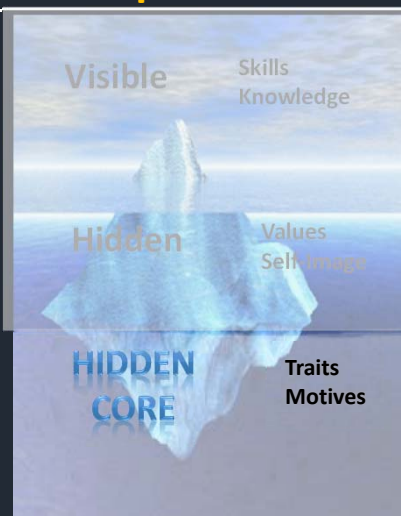
- Skills
- Knowledge
- Most easily developed

Hidden

- Self-image
- Values
- Usually more difficult to develop
- Usually more time consuming
- Enhanced contribution

Hidden Core

- Traits
- Motives
- Most difficult to develop
- Easier to hire for traits and motives than to develop them



Envisia Learning Leadership Meta-Competency Clusters

Mid-level Leader

- Communication
- Interpersonal
- Performance Management
- Problem Solving
- Emotional Intelligence

Next Level (Sr. Leader)

- Performance Leadership
- Change Leadership
- Emotional Intelligence (focus on empowering others)

Emotional Intelligence

It is not how intelligent we are, but how we are intelligent.

Speed Networking

What new insights did you take away from the self-assessment?

- Find a partner you do not know
- Answer the question above (4 minutes between the two of you)
- Repeat steps 1-3 with a new partner

2 rounds total



Activity – Partner Interview One

- Individually respond to the questions on page 4 – 10 min.
- Ask your partner to respond to each of the questions – 5 min. each for a total of 10 min.



Professional Development Planning



Five Elements of an Effective Plan

Assessment

Reflection

Individual Development Plan

Implementation

Monitoring/Evaluation



Special Considerations

- Assessment Considerations
 - Feedback from others
 - 360-degree feedback
- Reflection Considerations
 - Your work environment
 - Potential barriers to development



Crafting the Development Plan

Essential

- Goal statement

- Development activities

- Resources/Support

- Target dates

Next Level

- Implementation intentions

- Various modalities

- Board of Directors

- Mini-milestones

The Development Dance



- How will you develop in place?
- What is the greatest barrier to your professional development?
- How will you make time for your professional development?
- What can you commit to doing next week for your development?



Activity – Partner Interview Two





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