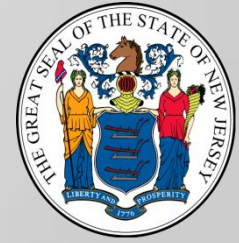
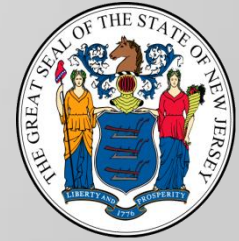


# Professional Development

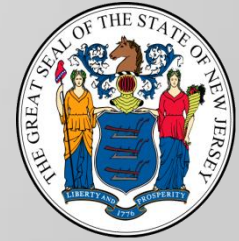


- Supervising as a Leader
- Tuition Reimbursement
- Mentoring
- NJSCPA and other Training
- Succession Planning
- Barriers & Solutions



- Supervising as a Leader
  - Modeled on the Internal Revenue Service XD Program
  - Development & Resources
  - Pilot
  - Feedback & Revisions
  - 1<sup>st</sup> class
  - Revisions to program & presenters

# Course Overview

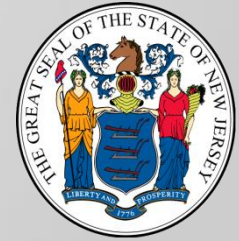


## PRIOR TO COURSE

Students are required to bring to class the following:

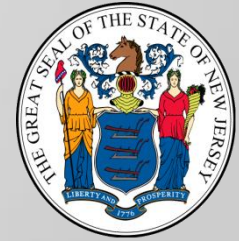
- Completed *Leadership Self-Assessment* Questionnaire (provided by advance e-mail)
- Results of Jung-Myers-Briggs Self-Assessment @ <http://www.humanmetrics.com/cgi-win/JTypes2.asp> (link/guidance provided by advance e-mail)
- Copy of the 1<sup>st</sup> page of their most recent PAR Agreement indicating Unit Goals

Students are also required to read and be prepared to discuss the *New York Times Corner Office* article @ [http://www.nytimes.com/2012/04/01/business/charlotte-beers-on-the-importance-of-self-assessment.html?\\_r=1](http://www.nytimes.com/2012/04/01/business/charlotte-beers-on-the-importance-of-self-assessment.html?_r=1) (link provided by advance e-mail)



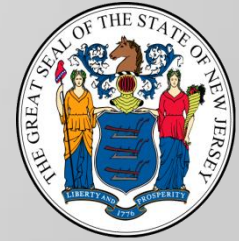
# Day 1

Lesson 1	60 minutes	<p>Introduction</p> <ul style="list-style-type: none"><li>• Director's Welcome</li><li>• Instructor Intro</li><li>• <b>Activity:</b> Build A Boss (Classroom)</li><li>• <b>Activity:</b> Expectations (Manual)</li></ul>
Lesson 2	105 minutes	<p>Organizational Chart</p> <ul style="list-style-type: none"><li>• Our Organization - Division Organizational Chart</li><li>• Overview of the Organization – Speakers from the Division</li></ul> <p>Treasury Core Mission Areas</p> <ul style="list-style-type: none"><li>• Our Mission – Discussion of Taxation Mission Statement</li><li>• Mission Statement</li></ul> <p><b>Activity:</b> <i>Developing a Mission Statement (Activities)</i></p>



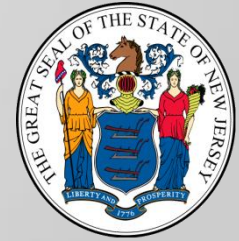
## Day 1 Continued

Lesson 3	60 minutes	<p>Intro to Core Values, Discussion &amp; Self-Assessment Review</p> <ul style="list-style-type: none"><li>• Core Value Discussion<ul style="list-style-type: none"><li>-Honesty</li><li>-Integrity</li><li>-Decisiveness</li><li>-Respect</li><li>-Inclusion</li><li>-Open Collaboration</li><li>-Personal Accountability</li><li>-Continuous Improvement</li></ul></li><li>• <b>Activity:</b> Collaboration Activity (Classroom)</li><li>• Jung &amp; Briggs-Myers Personality Test Review</li><li>• Who is Dr. David Keirse</li><li>• The Four Temperaments</li></ul>
----------	------------	--



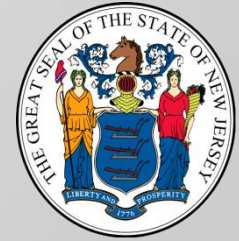
## Day 1 Continued

Lesson 4	105 minutes	<p>Leadership</p> <ul style="list-style-type: none"><li>• Leadership Self-Assessment Questionnaire Discussion</li><li>• Four characteristics of Leadership<ul style="list-style-type: none"><li>-Honesty</li><li>-Forward Looking (Visionary)</li><li>-Inspiring</li><li>-Competent</li></ul></li><li>• Credibility</li><li>• <b>Activity:</b> <i>How Do You Rate as a Leader?</i> (Activities)</li><li>• Lincoln on Leadership</li><li>• Five Fundamentals and Ten Commitments of Leadership</li><li>• <b>Activity:</b> <i>Challenging the Status Quo</i> (Activities)</li></ul>
----------	-------------	---



## Day 2

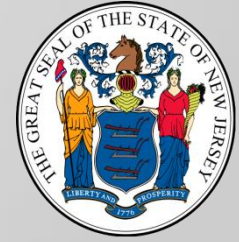
	75 minutes	<ul style="list-style-type: none"><li>• Five Fundamental Practices of Leadership in Action <i>Special Speakers to be determined by Director Bryan</i></li></ul>
Lesson 5	60 minutes	<p>Effective Communication</p> <ul style="list-style-type: none"><li>• Lincoln on Communication</li><li>• Verbal Communication</li><li>• Active Listening</li><li>• Written communication<ul style="list-style-type: none"><li>-Letter</li><li>-<b>Tool:</b> <i>Sample Supervisor Memos (Tools)</i></li><li>-Email</li></ul></li></ul>



## Day 2 Continued

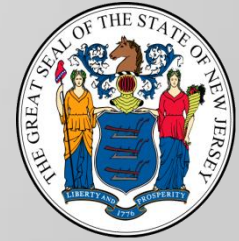
Lesson 6	75 minutes	<p>Growth: Worker to Supervisor</p> <ul style="list-style-type: none"><li>• Internal Growth/Adjustments</li><li>• Interpersonal Changes</li><li>• <b>Activity:</b> <i>Rate Your Supervisor</i> (Activities/Tools)</li><li>• Movement from “Doing” to “Managing”</li><li>• <b>Tool:</b> <i>Getting to Know You</i> (Tools)</li><li>• <b>Activity:</b> <i>Who’s Best for the Job?</i> (Activities)</li><li>• Delegation</li><li>• <b>Tool:</b> <i>Delegation Flowchart</i> (Tools)</li></ul>
Lesson 7	120 minutes	<p>Critical Thinking &amp; Decision Making</p> <ul style="list-style-type: none"><li>• <b>Activity:</b> Case Studies – Critical Thinking Exercises (PowerPoint)</li><li>• Critical Thinking</li><li>• Applying Critical Thinking</li><li>• <b>Activity:</b> Decision Making/Monkey Wrench Exercise (Classroom)</li></ul>





# Day 3

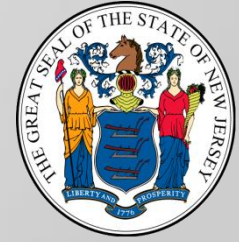
Lesson 8	60 minutes	<p>Prioritizing, Planning &amp; Organization</p> <ul style="list-style-type: none"> <li>• <b>Activity:</b> <i>Top Ten Time Wasters</i> (Classroom)</li> <li>• Tracking &amp; Analyzing Time</li> <li>• <b>Tool:</b> <i>Time Log</i></li> <li>• Prioritizing</li> <li>• Tips for Controlling Time</li> <li>• Organization</li> </ul>
Lesson 9	105 minutes	<p>Developing &amp; Motivating Employees</p> <ul style="list-style-type: none"> <li>• Employees' Motivation &amp; Development Needs</li> <li>• Using Delegation</li> <li>• Coaching</li> <li>• <b>Activity:</b> <i>Leader as a Coach</i> (Activities)</li> <li>• Goals</li> <li>• Motivating Employees</li> <li>• <b>Activity:</b> <i>Activate to Motivate</i> (Classroom)</li> <li>• Productive Feedback</li> <li>• <b>Activity:</b> <i>Employee-Supervisor Interactions</i> (Classroom) <ul style="list-style-type: none"> <li>Correcting Employees</li> <li>Disciplining Employees</li> <li>Handling "Problem" Employees</li> <li>Providing Positive Reinforcement</li> <li>Conducting Performance Evaluations</li> </ul> </li> </ul>



## Day 3 Continued

Lesson 10	60 minutes	<p>Time for Action!</p> <ul style="list-style-type: none"><li>• Evaluating Your Mission Statements (Manual/Activities)</li><li>• <b>Activity:</b> <i>Team Goals</i> (Manual)</li><li>• <b>Tool:</b> Ongoing Peer Support – Attendees Contact List (Tools)</li><li>• Course Wrap Up</li><li>• Conclusion</li></ul>
-----------	------------	---

# Mentoring & Tuition Reimbursement



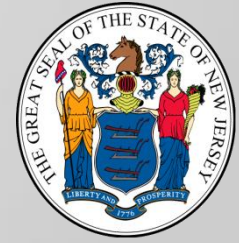
## Mentoring:

- Program
  - Administrative titles
- Non-Program

## Tuition Reimbursement

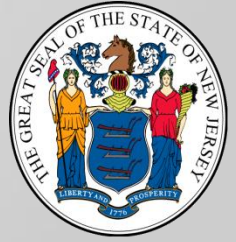
- Georgetown
- General program
- Limitations
  - Degree programs
  - Leaves out CTA, CPA, CPE
  - Funding limits

# Succession Planning



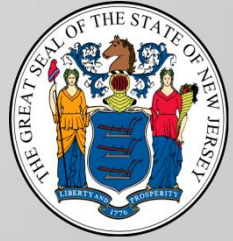
- Identifying at-risk positions
  - Identifying possible candidates for succession
  - Alternates
  - Development
- Involvement in processes
  - Reporting
  - Decisions
  - Personnel
- Communication
- Phase out and exit

# NJSCPA and Other Internal Programs



- NJSCPA
  - CPE
  - Accounting Skills
  - Other Soft topics
    - Writing Skills
    - Communication
- Internal Programs
  - Spreadsheet Skills
  - 482, CBT
  - Tax Updates

# Barriers and Solutions



- Promotional Freeze
  - Career Path?
- Pay freeze at management titles
  - Upside down comp model
  - Bargaining unit complications
- Creative solutions
  - 10% Rule (Parity & Merit)
- Additional Responsibility can result in promotion and raise (see 10% Rule)
- Civil Service path to Promotion and Raise
  - Risk of provisional title and test-taking weaknesses
  - Unintended results – reduction in responsibilities and no change to title or comp