

**THE COMMONWEALTH FUND
CAREER DEVELOPMENT PROGRAM – PARTICIPANT TRAINING**

VALUES AND CAREER FULFILLMENT

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Living your values is one of the keys to career fulfillment. Values are the qualities that make our lives compelling, interesting and fulfilling. They are the elements that enable us to thrive. A core principle of coaching is that if you are consistently happy, it is probably because you are living a life that manifests your core values. Conversely, if you feel consistently frustrated, angry or trapped, then you are probably not living your values.

Values are not the same thing as morals or ethics. They're not what you're *supposed* to like. They're what you *do* like. Living your values doesn't mean doing the right things. It means doing the things that make you feel right.

The first step is to articulate what your values actually are. Once you identify your values, you can explore ways of incorporating them more into your work and personal life.

PEAK EXPERIENCES AND VALUES

One way to uncover your values is to examine some of your peak experiences.

A peak experience is one in which you feel totally alive and fully engaged in what you are doing. During peak experiences, people feel deeply focused and often lose track of time. A person feels, in the language of psychologist Mihalyi Csikszentmihalyi, a sense of “flow.” Oftentimes, during a peak experience, you may not be aware that an activity is particularly pleasurable – it’s when you finish that you feel a sense of deep fulfillment. A peak experience can be pure fun or require extreme effort – either way, when you’re finished you think, “That was fantastic!”

A peak experience may last five minutes or last two years. One person might have a peak experience when slaloming down a mountain; another when caring for an infant; another when giving a presentation; another when being the MC at an annual offsite. Your peak experience might be a reflection of your public self, or it may manifest a secret self that few are aware of. It may be personal or professional. Peak experiences almost always manifest many of your core values. By revisiting them and reflecting on them, you can get clearer on what those values are.

In the spaces below, write a few sentences about one of your peak experiences. Don’t worry about articulating your values at first – concentrate on describing the details. Try answering the following questions to get you started:

- Where were you?

- What happened?

- Who were you with?

- How did you feel?

- What was good about it?

- What skills did you use?

- What feedback did you get?

- Other details you remember?

INTERESTS AND VALUES

Your interests often reflect core values. Quickly answer the following questions.

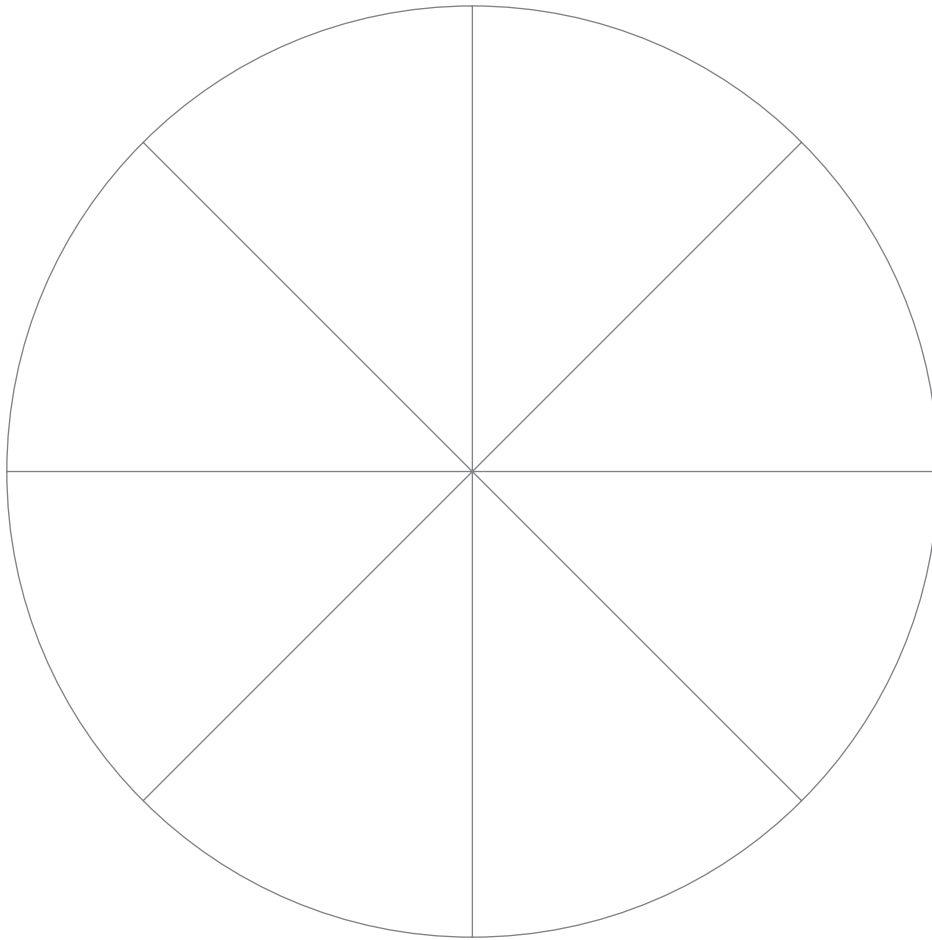
- 1. What parts of the newspaper do you read first?*
- 2. What are three books you've read in the past year?*
- 3. As a child, what did you do in your free time?*
- 4. What's a goal that has been on your list for a few years?*
- 5. What's a life you haven't lived?*
- 6. What are your hobbies?*
- 7. What types of activities energize you?*
- 8. What do you like to be in charge of?*
- 9. Which famous people intrigue you? What about them do you respect?*
- 10. What activities are you involved in outside of work?*

Review your answers to the questions above. What would you say are your top values? Consider yourself from the outside. What is important to this person?

INTERESTS AND VALUES

VALUES WHEEL

Using the values list from the previous page, label each section of the wheel with one of your top eight values. The midpoint of the wheel represents a zero, or "I am not at all expressing this value," and the perimeter of the wheel represents a 10, or "I am fully expressing this value." Shade in the section of the wheel according to how well you'd say you were expressing this value.



Ideally, you have a smooth, rounded wheel. Since life is not ideal, most people end up with wheels that are unbalanced, with some values flourishing and others dormant at best.

Which of your values are being strongly expressed?

Which ones are not being expressed very fully?

EXERCISE: COMPETENCY GAP ANALYSIS

Consider how your career and life may develop in the next few years. Describe the competencies you have those as well as those you need to acquire. Try to come up with at least three for each category. Your desired competencies might be things about which you've received feedback, or your own ideas. Consider both hard skills and soft skills.

COMPETENCY GAP ANALYSIS

Current Competencies

Examples:

- *Policy analysis*
- *Writing and editing*
- *Understanding of how foundations work*
- *Relationship-building — while I don't have that big of a network, the people I do know respect me and I feel comfortable with them*

Desired competencies

Examples:

- *Greater skill in statistical programs*
- *Management skills, especially delegation*
- *Writing for forums other than policy journals; greater versatility in form*
- *Dealing with conflict*

EXERCISE: RELATIONSHIPS

Personal Board of Directors – Brainstorming Exercise

Write the name of someone you know who:

1. Is incredibly organized _____
2. Knows how to have fun _____
3. Knows everyone _____
4. Can give you encouragement in tough times _____
5. Can talk to you straight about your weaknesses _____
6. Is unfailingly logical _____
7. Is deeply empathetic _____
8. Is open minded _____
9. Can handle a crisis _____
10. Has known you since childhood _____
11. Is a good listener _____
12. Is entrepreneurial _____
13. Has a cool job _____
14. Is good at making decisions _____
15. Is not afraid to fail _____
16. Has good work/life balance _____
17. Is an expert in the type of work you do _____
18. In an expert in a type of work you are interested in _____
19. Is successful in your field _____
20. Gives good advice about office politics _____
21. Gives good advice about professional development _____
22. Is someone you trust with your life _____
23. Thinks you are highly skilled at what you do _____
24. Thinks you have great talents beyond your current job _____
25. Thinks you are a great person _____

CAREER DEVELOPMENT ACTION PLAN – TEMPLATE

Name and Date: _____

Career Advisor: _____

SELF-ASSESSMENT SUMMARY STATEMENTS

Personal Values and Motivators

Describe your top values and the things that motivate you in your career.

Competency Gap Analysis

Identify the competencies you think you need to develop in the next few years. Identify the competencies you think are strong already. Include both hard and soft skills.

Future Vision

Write a sentence or two about what would be an appealing vision for you in the future.

SPECIFIC CAREER GOALS

Short-Term Goals (1 year)

Medium-Term Goals (2–5 years)

Long-Term Goals (5+ years)

CAREER DEVELOPMENT ACTION PLAN – TEMPLATE

DEVELOPMENTAL ACTIVITIES AND EXPERIENCES

Consider activities and experiences that could support your short-, medium- or long-term goals.

For each activity, identify the activity, consider mentor involvement, state the action steps, state the milestones/success measures and end with a target completion date.

Activity 1
Activity 2
Activity 3

SUPPORTING RESOURCES

State the resource need. This could include a mentor to contact for networking and support, the anticipated time away from the office, any financial costs and any other considerations

ACTION PLAN REVIEW

Check-in meetings scheduled for:
Final review meeting:

Staff Member Signature and Date

Career Advisor Signature and Date

CAREER DEVELOPMENT ACTION PLAN – EXAMPLE

Name and Date: _____

Career Advisor: _____

SELF-ASSESSMENT SUMMARY STATEMENTS

Personal Values and Motivators

Describe your values and the things that motivate you in your career.

My values include making an impact, doing high-quality work, collaborating with others, and intellectual challenge.

I want to develop my knowledge of health policy, especially as it impacts vulnerable populations in the US, so that I can be maximally effective in this area.

Self-expression and developing expertise are important. I would like more opportunities to write for the Fund and possibly to present or serve on a panel on this topic.

Competency Gap Analysis

Identify the competencies you think you need to develop in the next few years. Identify the competencies you think are strong already. Include both hard and soft skills.

I have domain knowledge in my field although to rise I will need greater expertise, particularly given how fast the field changes.

I need experience presenting to the public, both in written and oral form.

I have little managerial experience although I am frequently in collaborative environments that require me to influence others. I would like to improve basic management skills.

Future Vision

Write a sentence or two about what would be an appealing vision for you in the future.

To be a noted expert in the health policy field focusing on disadvantaged populations. This could be in a foundation, a nonprofit or possibly at a university.

To be taken seriously as a domain expert and also be known as an effective manager.

CAREER DEVELOPMENT ACTION PLAN – EXAMPLE

SPECIFIC CAREER GOALS

Short-Term Goals (1 year)

Find and apply for a master's degree program in the NYC area.

Start working on my writing and presentation skills.

Get a poster accepted at a conference.

Medium-Term Goals (2–5 years)

Attend master's program, while working full-time. Consider a PhD program.

Identify a topic area where I can become one of the experts. Write and present to the public.

Take on some management responsibilities or teaching opportunities.

Long-Term Goals (5+ years)

Become a noted expert running my program either at a foundation, a think tank or in academia

DEVELOPMENTAL ACTIVITIES AND EXPERIENCES

Consider activities and experiences that could support your short-, medium- or long-term goals.

For each activity, identify the activity, consider mentor involvement, state the action steps, state the milestones/success measures and end with a target completion date.

Activity 1: Start working on my writing and presentation skills

With my manager, identify several opportunities where I might be able to do some research on my own. Start to sketch out the body of thought.

Alternatively, this could be in conjunction with the STATA Class that MMD plans to start again later this Fall.

In either scenario, review with my career advisor and develop a plan for what to publish and opportunities where it could be presented.

Activity 2: Find and apply for a master's degree program in the NYC area

I will figure out the programs that best suit me and once I have identified them, I will meet with my career advisor to talk about the merits of each. Then I will proceed to apply for the program/s.

Activity 3: Get a poster accepted at a conference.

This activity is likely in conjunction with Activity #1 above.

CAREER DEVELOPMENT ACTION PLAN – EXAMPLE

SUPPORTING RESOURCES

State the resource need. This could include a mentor to contact for networking and support, the anticipated time away from the office, any financial costs and any other considerations

If I am able to attend a couple conferences where I will present, there will be travel and conference fees involved: \$2,500.

A master's program will use Tuition Assistance at the maximum of \$8,000 per year

ACTION PLAN REVIEW

Check-in meetings scheduled for:

Final review meeting:

Staff Member Signature and Date

Career Advisor Signature and Date

CAREER DEVELOPMENT ACTION PLAN – TEMPLATE

Check on relevance to long-term career development

- *How does this relate to your long-term career development?*
- *What's important about this to you?*

Flesh out the goal

- *How will you measure this?*
- *What's your time frame?*
- *How can you break this goal into smaller pieces?*
- *(If it seems very ambitious) What is a realistic amount to accomplish in the next 6-12 months?*
- *(If it doesn't seem ambitious enough) How could you take this up a notch?*

Action steps

- *What are specific actions you could take to move toward this goal?*
- *What's the first step in the process?*
- *What can you do this month?*
- *What can you do besides taking a class?*

Bigger-picture questions

- *How would you like to grow?*
- *Where would you like to be in 5 years?*
- *Whom do you see as a role model? What do they do that is compelling to you?*
- *What's a development goal you've put off that you'd like to work on?*

COACHING VS. PROBLEM SOLVING

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Coaching and problem solving are two distinct approaches to helping that are complementary and can be used in tandem to support the professional development of a given individual.

In general, problem solving means supporting an individual by giving advice based on your own experience, knowledge, and opinions. Coaching means supporting an individual by asking questions that unlock assumptions, expand possibilities, and assess options.

The table below illustrates some of the key differences between coaching and problem solving.

COACHING	PROBLEM SOLVING
<i>Coachee has the answer</i>	<i>You have the answer</i>
<i>Coach does not “fix” the problem or give advice. Solutions are elicited from the Coachee</i>	<i>You give advice and provide solutions</i>
<i>Facilitative</i>	<i>Directive/Instructional</i>
<i>Relationship is based on the facilitation of an individual’s learning and development</i>	<i>Relationship is based on the transfer of specific knowledge from you to the other person</i>
<i>Parameters of relationship are negotiated between Coach and Coachee</i>	<i>Parameters of relationship are less likely to be discussed or negotiated between you and the other person</i>
<i>Coach champions Coachee to be their own best advocate</i>	<i>You act as an advocate or sponsor on behalf of the other person</i>

When coaching, we assume that the Coachee is capable of finding the solutions with proper guidance and support. The role of the Coach is to ask powerful and insightful questions that help the Coachee view situations in new and helpful ways. With problem solving, we assume that the quickest way to effective solutions is by imparting actual knowledge to the other person, usually based on the your own experience.

COACHING VS. PROBLEM SOLVING – COMPARISON

Below is an example of how coaching and problem-solving approaches would differ in addressing the same issue or challenge.

SITUATION

Frank has been working at the organization for three years. He likes certain aspects of his job but is frustrated with others. He's not as challenged as he would like and finds some of the people on his team hard to work with. He likes being at the organization but is wondering if he's in the right place. He has come to you, a trusted advisor, for guidance.

Problem-Solving Approach

Frank: *To be honest, I'm kind of frustrated. I thought that my promotion would be a big change, but I'm still doing a lot of grunt work. The work is really intense but it's not all that intellectually challenging. Plus, I don't know how to deal with my boss – he barely answers my emails and I don't think he's really there for me. I'm thinking of looking for another role – do you think that's a good idea?*

Advisor: *I get what you're saying about the work. There are still days when I feel like I'm doing grunt work – but don't worry, over time it gets better. You'll gradually get more challenging assignments and if you do a good job eventually people notice.*

Frank: *That sounds reasonable.*

Advisor: *And your boss might just be busy – who knows what's on his mind? He's probably not even aware he's not answering your emails. I know that I'm always behind on my emails. I think the key is to take care of yourself – make sure you take little breaks here and there, even if it's just to get a coffee. If you want, I'll try to keep a look out for interesting things but I think the key is just to take days one at a time.*

Frank: *I guess you're right. I'll give that a try.*

Coaching Approach

Frank: *To be honest, I'm kind of frustrated. I thought that my promotion would be a big change, but I'm still doing a lot of grunt work. The work is really intense but it's not all that intellectually challenging. Plus, I don't know how to deal with my boss – he barely answers my emails and I don't think he's really there for me. I'm thinking of looking for another role – do you think that's a good idea?*

Coach: *What's most frustrating to you now?*

Frank: *Well, like I said, the work is really intense. And even though I said it's not that challenging, it takes a lot of attention. But I never really know how I'm doing, or where I'm going.*

Coach: *How do you think you're doing?*

Frank: *Maybe I'm doing okay. I got a good performance review. I just wish I knew about my future.*

Coach: *By your future, you mean–*

Frank: *Like what future options I have, and what I have to do to get there.*

Coach: *Who do you know who might be able to give you that kind of information?*

Frank: *You, hopefully.*

Coach: *Sure, I'll give you my thoughts – but who else?*

COACHING VS. PROBLEM SOLVING – COMPARISON

Coaching Approach (continued)

Frank: *I could ask my manager. I've never really sat down with him and talked about my career plans. I guess I could ask for time on his calendar to discuss this. Also, a couple of the people who entered the organization the same year I did seem confident about how their careers are rolling out. I could ask them.*

Coach: *What would you ask them?*

Frank: *Where can I expect to be in 2 years or 5 years? What skills should I be learning? That kind of thing. I think I might also like to take some courses, you know, so I could keep developing my skills.*

Coach: *So let's talk about courses for a minute . . .*

GETTING THE MOST FROM THE PROGRAM

1. How do you think your advisor could help you?

2. What do you not expect your advisor to do for you?

3. What is the ideal cadence for you to meet?

4. What cadence do you think would work for your advisor?

5. What do you think your advisor wants to get out of this relationship?

6. Assume that the relationship doesn't seem to be unfolding optimally. How could you raise this?

7. What would be the right amount of initiative for you to take in making this program work?

What would be too little?

What would be too much?

8. Imagine apportioning responsibility for making this program work among you, your advisor, and the organization. How much responsibility do you allocate to each party?
