COATES LEADERSHIP INSTITUTE

Executive Implementation Roadmap

A 24 Month Path for Institutionalizing Professional Competence

EXECUTIVE PURPOSE

This roadmap helps agency leaders move from readiness assessment to governed implementation. It sequences the decisions, structures, evidence, and leadership practices required to embed Knowledge, Skill, Judgment, and Values across the organization.

The roadmap is designed for executive teams that intend to build durable organizational capacity, not merely launch another training initiative. It establishes a disciplined sequence while preserving room for agency size, legal requirements, labor arrangements, community expectations, and operational realities.

Professional Competence Enterprise™

Knowledge • Skill • Judgment • Values

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How to Use This Roadmap

The central implementation decision is not whether the organization supports professional competence in principle. It is whether leadership will align the systems that define, develop, observe, evaluate, reward, and protect competent performance. This roadmap organizes that work into phases with explicit decision gates.

Intended Users

- Agency heads and executive command staff.
- Governing officials and public-safety administrators.
- Training, accreditation, human resources, legal, and labor-relations leaders.
- Supervisors responsible for coaching and performance development.
- Implementation teams charged with systems alignment and evidence collection.

Recommended Use

- Complete the Organizational Readiness Guide before adopting dates.
- Name an executive sponsor and a cross-functional implementation team.
- Tailor the sequence without bypassing evidence or governance gates.
- Review progress monthly and conduct formal gate reviews at phase transitions.
- Record decisions, evidence, risks, and unresolved questions throughout implementation.

IMPORTANT BOUNDARY

This roadmap supports organizational planning. It does not determine individual competence, replace legal or labor review, validate an assessment instrument, or authorize disciplinary action.

Enterprise Implementation Support

The public roadmap establishes the implementation architecture. Agency-specific policy crosswalks, facilitated diagnostics, customized measures, governance charters, supervisor tools, evaluation alignment, and implementation coaching are developed through Professional Competence Enterprise™ engagements.

The Implementation Architecture

Professional competence becomes institutional only when doctrine, leadership behavior, operating systems, and evidence reinforce the same expectations. The roadmap therefore advances six workstreams together.

Workstream	Executive Question	Primary Result
Governance and doctrine	Who owns the work, and what does competent performance mean here?	Authority, charter, definitions, safeguards
Policy and operations	Do directives and daily practice support the Four Domains?	Aligned expectations and operational guidance
Learning and coaching	Can personnel practice, receive feedback, and improve?	Developmental learning and supervisor capacity
Evaluation and assessment	What evidence supports performance conclusions?	Fair, observable, role-relevant measures
Talent and accountability	Do promotion, recognition, correction, and succession reinforce competence?	Consistent personnel systems
Communication and trust	Can employees and stakeholders understand the purpose and process?	Transparency, participation, legitimacy

Four Implementation Rules

- Sequence before speed. Build authority, definitions, and safeguards before changing high-consequence systems.
- Evidence before conclusion. Distinguish documents, stated practice, observed practice, and verified outcomes.
- Development before punishment. Use the framework first to clarify and strengthen performance, with due process governing any accountability action.
- Integration before expansion. Pilot connected systems in a limited setting before agency-wide scale.

Executive Standard

Leaders should be able to explain what is changing, why it is changing, what evidence will be used, who has decision authority, how fairness will be protected, and how the organization will know whether implementation is improving performance.

Governance and Decision Rights

Implementation requires visible executive ownership and distributed operational participation. A committee without authority will stall; an executive directive without practitioner input will produce compliance without ownership.

Role	Core Responsibility	Required Authority
Executive sponsor	Sets purpose, protects resources, resolves barriers, approves gates	Final implementation decisions
Steering group	Coordinates workstreams, reviews evidence, manages risk	Recommend phase advancement
Implementation lead	Maintains plan, evidence register, action log, and reporting	Coordinate across units
Workstream owners	Complete defined deliverables and surface conflicts	Act within assigned systems
Legal HR labor advisors	Review due process, records, employment, and bargaining implications	Advise before high-consequence changes
Supervisor representatives	Test usability and operational realism	Recommend field-level refinements
Employee and stakeholder voices	Identify experience, clarity, and trust concerns	Provide structured input

Minimum Governance Artifacts

- Executive authorization and scope statement.
- Implementation charter with roles, decision rights, and meeting cadence.
- Evidence register and decision log.
- Risk and dependency register.
- Communication and stakeholder-engagement plan.
- Phase-gate review record.

GOVERNANCE SAFEGUARD

The steering group may recommend advancement. The executive sponsor remains accountable for confirming that evidence, legal review, workforce implications, operational capacity, and unresolved risks have been considered.

The 24 Month Roadmap at a Glance

The schedule is a disciplined reference, not a mandate to move before the organization is ready. Agencies may extend a phase. They should not skip a gate merely to preserve a target date.

Phase	Timing	Primary Aim	Gate Outcome
0 Authorize	Days 0-30	Establish purpose, scope, ownership, and safeguards	Proceed to foundation work
1 Establish	Months 1-3	Define doctrine, baseline readiness, and governance	Foundation approved
2 Align	Months 4-8	Crosswalk policy and personnel systems	Pilot design authorized
3 Prepare	Months 9-12	Build supervisor and implementation capacity	Pilot readiness confirmed
4 Pilot	Months 13-16	Test the integrated model in a bounded setting	Evidence supports refinement
5 Scale	Months 17-20	Expand with quality controls and support	Agency-wide adoption confirmed
6 Institutionalize	Months 21-24	Embed review, audit, succession, and renewal	Sustainment cycle activated

Readiness to Advance

A phase is complete when its decision conditions are met, not when its calendar window expires. Advancement should be supported by documented deliverables, stakeholder input, operational capacity, risk treatment, and an executive decision recorded in the implementation log.

When to Pause

- No accountable executive owner or unresolved authority conflict.
- Material legal, labor, records, privacy, or technology issue.
- Measures cannot distinguish development from discipline.
- Supervisors lack time, training, or support to perform the expected role.
- Pilot evidence shows inconsistent interpretation or disproportionate effect.

Phase 0 Authorize the Work

PHASE 0
Days 0-30

Create the authority and conditions for disciplined implementation.

- State the organizational problem and desired outcome without presuming individual failure.
- Identify the executive sponsor, implementation lead, and steering group.
- Define initial scope, exclusions, resources, and non-negotiable safeguards.
- Confirm legal, human-resources, labor, records, privacy, and accreditation review pathways.
- Announce the review process with accurate expectations and no premature promises.

Decision gate: Leadership approves the charter, scope, governance, safeguards, and readiness-assessment process.

Required Deliverables

Deliverable	Acceptance Condition
Executive authorization	Purpose, authority, sponsor, resources, and reporting are explicit.
Implementation charter	Roles, decisions, cadence, scope, and escalation path are documented.
Stakeholder map	Affected groups, interests, risks, and engagement methods are identified.
Initial risk register	Material risks have owners and treatment plans.
Communication brief	Employees understand that the work is developmental, evidence-based, and phased.

Executive Questions

- What problem are we trying to solve?
- What will remain unchanged during the initial review?
- What authority does the implementation team have?
- What evidence would cause us to slow, revise, or stop?

Phase 1 Establish the Foundation

PHASE 1
Months 1-3

Create a shared doctrine and evidence-based baseline.

- Complete the Organizational Readiness Guide with a cross-functional team.
- Define professional competence and each domain in agency-relevant language.
- Inventory existing initiatives, measures, policies, and data sources.
- Identify contradictions between stated expectations and operating systems.
- Select implementation priorities based on readiness, risk, and leverage.

Decision gate: Executives approve the doctrine statement, baseline findings, priority workstreams, and evidence safeguards.

Foundation Test

Question	Sufficient Evidence
Is the doctrine clear?	Leaders and supervisors can explain Knowledge, Skill, Judgment, and Values consistently.
Is readiness understood?	Dimension scores are supported by records, observations, and differing perspectives.
Are priorities proportionate?	Selected priorities address significant gaps without exceeding capacity.
Are safeguards credible?	Leaders can explain privacy, access, due process, and permitted uses of evidence.

Do Not Advance If

- Professional competence is being treated as a slogan or training label.
- Readiness ratings rely mainly on intention rather than evidence.
- The organization has not separated developmental assessment from disciplinary decision-making.
- Leaders disagree about the purpose but have concealed the disagreement to preserve momentum.

Phase 2 Align the Systems

PHASE 2
Months 4-8

Translate doctrine into coherent organizational expectations.

- Crosswalk policies, training, evaluation, promotion, accountability, recognition, and succession systems.
- Identify duplications, gaps, contradictions, and unintended incentives.
- Define observable role expectations without reducing competence to a checklist.
- Design proportionate evidence standards and review controls.
- Select the bounded unit, role, or process for the pilot.

Decision gate: Leadership approves the system-alignment plan, pilot scope, measures, review controls, and resource commitment.

Alignment Matrix

System	Key Alignment Question	Evidence of Progress
Policy	Does policy identify what must occur while leaving room for sound judgment?	Crosswalk and revision priorities
Training	Does learning require application, practice, feedback, and transfer?	Curriculum and reinforcement map
Evaluation	Are conclusions tied to role-relevant, observable evidence?	Revised criteria and reviewer guidance
Promotion	Do criteria examine leadership potential across all four domains?	Competency-linked selection matrix
Accountability	Are coaching, correction, and discipline distinguished and documented fairly?	Decision pathway and safeguards
Succession	Are future leaders deliberately identified and developed?	Talent review and development pathway

Control Point

No high-consequence instrument should be activated solely because its language now references the Four Domains. Instruments require role analysis, evidence standards, reviewer preparation, bias and consistency checks, appropriate validation, and legal or labor review as applicable.

Phase 3 Prepare Leaders and Systems

PHASE 3 **Months 9-12**	**Build the human and operational capacity required for a fair pilot.** • Prepare supervisors to observe, inquire, coach, document, and follow up. • Train implementation personnel on evidence boundaries and consistent use. • Test forms, workflows, access controls, escalation paths, and support resources. • Use practice cases to calibrate interpretation across reviewers. • Finalize pilot communications, baseline measures, and evaluation plan. **Decision gate:** A readiness review confirms that people, tools, safeguards, support, and measurement are operational.

Supervisor Capacity Standard

- Describe observable behavior without unsupported labels.
- Gather relevant facts before reaching a conclusion.
- Distinguish policy compliance, performance quality, and legitimacy concerns.
- Coach one or more usable alternatives.
- Confirm understanding and establish follow-up.
- Document proportionately and protect confidential information.

Pilot Readiness Checklist

Condition	Status
Pilot purpose and boundaries are understood	Ready / Needs work
Participants know what data will be collected and how it may be used	Ready / Needs work
Supervisors have practiced with calibrated examples	Ready / Needs work
Support and escalation channels are operational	Ready / Needs work
Baseline and follow-up measures are defined	Ready / Needs work
Legal, labor, privacy, and records reviews are complete	Ready / Needs work

Phase 4 Pilot the Integrated Model

PHASE 4
Months 13-16

Test whether the connected model works under real operating conditions.

- Launch in a bounded environment with visible executive support.
- Monitor fidelity, workload, clarity, user experience, and unintended effects.
- Collect quantitative and qualitative evidence from multiple perspectives.
- Hold structured learning reviews without concealing negative findings.
- Refine doctrine, tools, training, workflow, and safeguards before expansion.

Decision gate: Executives determine whether evidence supports scaling, another pilot cycle, redesign, or discontinuation.

What the Pilot Must Answer

Question	Example Evidence
Can supervisors use the process consistently?	Calibration results, observation, documentation review
Does the process improve developmental dialogue?	Employee and supervisor feedback, follow-up quality
Are decisions more evidence-based?	Sample audit, rationale quality, reduced unsupported labels
Is the workload sustainable?	Time, completion, backlog, support requests
Are effects fair and proportionate?	Pattern review across assignments and relevant groups
Does the model improve operational learning?	Examples of changed practice, transfer, and problem resolution

Pilot Rule

The purpose of a pilot is to learn whether the system is ready, not to prove that the design team was right. Findings that require revision are evidence of responsible implementation when leaders act on them.

Phase 5 Scale With Quality Controls

PHASE 5
Months 17-20

Expand the model while preserving fidelity, fairness, and support.

- Sequence expansion by readiness and operational capacity.
- Use trained internal facilitators and calibration leads.
- Maintain office hours, technical support, and leadership visibility.
- Monitor adoption and quality separately; completion alone is not success.
- Correct drift before adding more units, roles, or instruments.

Decision gate: Leadership confirms that agency-wide adoption can proceed without weakening safeguards or supervisory quality.

Scale Controls

- Cohort-based rollout rather than simultaneous unrestricted launch.
- Standard orientation and supervisor preparation before local activation.
- Version control for forms, guidance, definitions, and measures.
- Regular sample review for evidence quality and consistent interpretation.
- A documented exception and escalation process.
- Feedback channels that allow concerns without retaliation.

Signals of Implementation Drift

Signal	Executive Response
Four Domains used as labels without evidence	Recalibrate and audit examples.
Forms completed but coaching absent	Observe practice and address workload or skill gaps.
Ratings cluster without meaningful differentiation	Review evidence, incentives, and reviewer confidence.
Developmental records migrate into discipline without clear rules	Pause use and review due process and access.
Leaders report only completion rates	Require quality, experience, and outcome evidence.

Phase 6 Institutionalize and Renew

PHASE 6 Months 21-24	**Make professional competence part of the organization's normal leadership system.** • Embed doctrine in executive governance, supervisor practice, and talent systems. • Adopt a recurring audit, calibration, and policy-review cycle. • Integrate lessons into succession, budgeting, training plans, and strategic priorities. • Publish appropriate internal progress findings while protecting confidential information. • Set the next 12- to 24-month improvement agenda. **Decision gate:** The executive team accepts the sustainment plan, assigns permanent ownership, and activates the renewal cycle.

Sustainment Cycle

Cadence	Leadership Activity
Monthly	Review implementation indicators, barriers, support demand, and action items.
Quarterly	Calibrate supervisor practice; sample documentation; assess system drift.
Semiannual	Review outcomes, workforce experience, equity, policy alignment, and training transfer.
Annual	Repeat readiness review; audit governance; reset priorities and resources.
Every 24 months	Conduct a comprehensive systems-alignment and institutionalization review.

Institutionalization Test

The model is institutionalized when competent performance is defined consistently, leaders use evidence responsibly, supervisors can coach effectively, personnel systems reinforce the doctrine, safeguards operate in practice, and the organization detects and corrects drift without waiting for a crisis.

The First 90 Days

The first 90 days should create clarity and capacity, not a rush of new forms. The objective is an authorized foundation from which later system changes can proceed responsibly.

Window	Executive Actions	Outputs
Days 1-15	Name sponsor and lead; state purpose; define boundaries; identify advisors; preserve current processes unless separately authorized.	Authorization, initial scope, stakeholder map
Days 16-30	Approve charter; establish steering group; open risk and decision logs; communicate the process.	Governance charter, risk register, communication brief
Days 31-60	Complete readiness assessment; collect evidence; inventory connected systems; identify contradictions.	Readiness profile, evidence register, system inventory
Days 61-75	Draft doctrine statement; choose priorities; identify pilot candidates; assess resources and dependencies.	Draft doctrine, priority map, pilot options
Days 76-90	Review with stakeholders; resolve major questions; approve Phase 2 plan and gate decision.	Approved foundation and alignment workplan

Day 90 Executive Briefing

- What the evidence shows about current readiness.
- What remains unknown or contested.
- Which system contradictions create the greatest risk.
- Which priorities are recommended and why.
- What resources and safeguards are required.
- Whether the organization should proceed, pause, narrow, or redesign.

FIRST 90 DAYS STANDARD

At Day 90, executives should possess a defensible baseline and an approved plan. They should not claim that the organization has already institutionalized professional competence.

Measurement and Evidence Framework

Measurement should help leaders understand implementation quality and organizational learning. It should not create the appearance of precision where evidence is weak or turn developmental data into an undisclosed disciplinary system.

Measure Type	What It Answers	Examples
Readiness	Do the conditions for implementation exist?	Dimension ratings, evidence quality, unresolved dependencies
Fidelity	Is the model being used as designed?	Preparation, observation, coaching, follow-up, safeguard adherence
Capability	Can leaders perform the required practices?	Scenario performance, calibration, coaching quality
Experience	How is the process understood and experienced?	Clarity, fairness, usefulness, trust, workload feedback
Outcome	What changed in practice or system performance?	Transfer, decision quality, recurring issues, development progress
Sustainment	Can the organization maintain and improve the model?	Ownership, resources, audit findings, drift correction

Evidence Hierarchy

- Documented intention: a policy, plan, curriculum, or stated expectation exists.
- Reported practice: participants describe how the process operates.
- Observed practice: reviewers see the behavior or workflow being performed.
- Verified pattern: multiple sources show consistent practice over time.
- Demonstrated outcome: credible evidence connects implementation to a meaningful change.

Interpretation Rule

No single measure should carry more meaning than its design supports. Leaders should triangulate records, observation, participant experience, operational context, and outcomes before drawing conclusions.

Risk Controls and Ethical Boundaries

Risk	Control
Framework becomes a disciplinary shortcut	Separate developmental and disciplinary pathways; disclose permitted uses.
Four Domains reduced to generic labels	Require behavior, context, evidence, and rationale.
Policy compliance treated as complete competence	Examine skill, judgment, values, outcomes, and public-facing process.
Supervisor inconsistency	Train, calibrate, observe, review samples, and support improvement.
Data overreach or privacy loss	Limit collection, access, retention, reuse, and reporting.
Bias or disproportionate impact	Review patterns, decision points, criteria, and contextual explanations.
Implementation overload	Sequence work, remove redundant tasks, and resource the supervisor role.
Public messaging exceeds evidence	Report accurately; distinguish aspiration, progress, and verified outcomes.
Vendor or technology drives doctrine	Make governance and evidence decisions before selecting tools.

Non Negotiable Safeguards

- Clear purpose and permitted use for every measure.
- Role relevance and reasonable opportunity to demonstrate performance.
- Documented evidence and reviewable rationale.
- Appropriate notice, confidentiality, access, retention, and appeal or correction processes.
- Human accountability for consequential decisions; technology may assist but does not own the judgment.

ETHICAL STANDARD

Professional competence implementation must model the fairness, judgment, accountability, and stewardship it seeks to develop.

Executive Dashboard

Use a compact dashboard to focus executive attention on decision quality rather than activity volume. Each indicator should show current status, supporting evidence, owner, trend, and required action.

Indicator	Green	Yellow	Red
Governance	Roles and decisions clear	Minor ambiguity or delay	No owner or unresolved authority
Readiness	Evidence supports advancement	Material gaps with treatment plan	Conditions absent or unsupported
Supervisor capacity	Practice and calibration meet standard	Uneven skill or support	Unprepared or overloaded supervisors
Safeguards	Controls tested and operating	Control gaps under correction	Due process or privacy risk
Fidelity	Core practices consistently observed	Drift in limited areas	Process reduced to completion
Experience	Purpose and process broadly understood	Mixed clarity or trust	Fear, confusion, or undisclosed use
Outcomes	Credible improvement evidence emerging	Too early or inconsistent	Negative effects or unsupported claims
Sustainment	Ownership and resources embedded	Dependencies remain	Initiative depends on individuals

Monthly Executive Questions

- What evidence changed our understanding this month?
- Where are we observing drift, overload, or unintended effects?
- Which unresolved decision blocks responsible progress?
- What support do supervisors and employees need?
- Are any claims being made beyond the evidence?
- What must be completed before the next gate?

Executive Decision Record

Complete a decision record at every phase gate. The record preserves accountability, institutional memory, and the reasoning behind implementation choices.

Field	Executive Record
Decision date	______________________________
Phase and decision	______________________________
Evidence reviewed	______________________________ ______________________________
Stakeholder input	______________________________ ______________________________
Material risks	______________________________ ______________________________
Safeguards confirmed	______________________________ ______________________________
Decision	Proceed / Proceed with conditions / Extend / Redesign / Stop
Conditions and actions	______________________________ ______________________________
Owner and due date	______________________________
Executive approval	______________________________

Decision Standard

A gate decision should be understandable to someone who was not present. It should identify what was known, what remained uncertain, whose perspectives were considered, how risks were treated, and why the selected course was proportionate.

From Roadmap to Agency Implementation

This roadmap establishes the sequence and executive disciplines necessary to begin. The next level of work converts the framework into agency-specific governance, systems, tools, measures, and leadership practice.

Agency Specific Enterprise Work

Area	Customized Deliverable
Readiness and governance	Facilitated diagnostic, executive briefing, governance charter, risk plan
Doctrine and policy	Agency doctrine statement, policy and procedure crosswalk, revision priorities
Supervisor practice	Role-specific scenarios, coaching tools, observation guides, calibration process
Evaluation and assessment	Evidence standards, measures, reporting rules, validation and review plan
Promotion and succession	Competency-linked criteria, development pathways, decision safeguards
Accountability	Development, correction, discipline, documentation, access, and due-process architecture
Implementation support	Pilot design, facilitator preparation, executive dashboard, audit and sustainment cycle

Recommended Next Step

Convene the executive team to review the Organizational Readiness Guide and this roadmap together. Confirm the implementation purpose, identify the executive sponsor, and authorize a 90-day foundation phase before selecting technology, revising high-consequence instruments, or announcing agency-wide adoption.

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