

# **The Individual Development Plan**

## **General Guidelines**

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## Introduction

The following information explains the responsibilities of the employee and Manager in completing the Individual Development Plan (IDP) and outlines a step-by-step process for preparing an IDP.

The IDP is developed by the employee and their Manager. As the Plan is built, the employee and Manager will outline developmental objectives and career goals. The employee and Manager will also select learning activities for achieving these objective and goals.

The purpose of an IDP is twofold. First, it ensures that the employee maintains the current level of job proficiency, through continued training and developmental activities. Secondly, the employee charts a career path by identifying new knowledge, skills and abilities to pursue, as well as learning activities needed to reach the established goals. Third, the IDP will support organization mission and career field needs.

The following information will help you:

- Analyze your career goals and objectives
- Learn how to make Individual Development Plans
- Prepare your formal IDP
- Analyze the organization's needs for individual development planning
- Get ready for the employee-Manager conference
- Find and use resources for individual development planning

## What is an IDP?

IDPs are individually tailored and describe objectives and activities for the employee's career development. IDPs can be a win/win strategy because they benefit both the employee and the organization. Employees benefit, because implementing an IDP helps them enhance their knowledge, skills and experiences. Improved competencies help them achieve personal and career goals both inside of and external to the organization. The organization benefits by developing improved employee capabilities, workload planning, and resume needs. Competent employee performance, plus the added bonus of improved morale, and personal job satisfaction can make the organization more effective.

IDPs work by helping an employee and Manager clarify things that are important to them and plan to achieve them. In the IDP are career objectives, and the knowledge, skills and abilities needed to achieve these objectives, as well as, activities that will provide employees the opportunity to learn and apply the knowledge and skills.

An Individual Development Plan (IDP) is:

- A clear statement of an employee's career goals,
- A map for attaining goals that specifies immediate and long-range developmental needs,
- An individually-tailored action plan to develop specific competencies (knowledge and skills) needed to improve performance in present position or to prepare for new responsibilities,
- A written plan for scheduling and managing an employee's development,
- A tool for a Manager to estimate resources needed for employee development training,
- An agreement between the employee and Manager based on funds available to meet

- the employee's and the organization's goals and
- A tool for an organization to develop its workforce to meet future needs.

## **Purpose of the IDP**

Most employees want to grow in their present positions or progress to new ones. To do this effectively, a realistic action plan is needed. An IDP can be a useful tool to help plan a career, guide development and assess progress toward career goals and objectives. This includes the following:

- Responsibility areas – IDPs describe the areas of responsibility assigned to the employee as stated in his/her position description and the competencies needed to perform the responsibility.
- Developmental activities – Each responsibility area is accompanied by one or more specific developmental activities that will enable the individual to achieve or practice that competency.
- Time line with milestones and date completed – Realistic start dates, end dates, and other major milestones are established for each activity. The date completed should be listed when the employee can document proficiency based on the competency, skill or ability obtained.

## **When to Prepare an IDP**

Timing is an important factor in developing the IDP, because the following processes work together to establish the same objectives:

- the performance appraisal
- the training needs analysis
- career development planning, and
- the IDP

The optimum time for preparing the IDP is during the first few weeks immediately following the performance appraisal.

## **Benefits to Employees and Managers**

IDP's shall provide meaningful training plans that will help the:

### **EMPLOYEE to:**

- Perform duties according to established job standards,
- Improve job performance,
- Set reasonable goals,
- Assess particular strengths and weaknesses and,
- Schedule and plan own individual development each year.
- To benefit from an IDP, you must be involved and make a serious commitment to your career future. It may take several hours of your time, but it's an effort that should later prove to be well worth the investment.

## **MANAGER to:**

- Aid in the development of their employees to achieve the knowledge, skills and competencies according to their performance standards,
- Accurately document the current developmental needs of their employees and consider the unit's and/or agency's organizational needs, mission changes, changes in technology, expected turnover, staffing needs, program plans and future needs for particular skills.

## **Who Is Responsible for Developing an IDP?**

Both the Manager and the employee are responsible for developing an IDP. While the employee completes the IDP, with the cooperation and assistance of the Manager, it is the Manager who normally has to approve individual activities on the IDP. The Manager is responsible for performance improvement, and the IDP process is an important tool to achieve that objective.

Developing an IDP is a collaborative effort. When the employee and Manager systematically work through the steps in this guide, an important opportunity exists to:

- Discuss critical job requirements and responsibilities
- Outline the knowledge and skills needed to perform the work
- Identify an employee's talents and needs
- Define individual job satisfaction
- Improve both organizational and individual performance

## **Employees – Responsibility**

Each employee has the primary responsibility for working closely with their Manager to develop and monitor his or her IDP.

This includes:

- Identifying short and long-range goals, developmental objectives and activities to achieve these goals.
- Identifying additional knowledge, skills and abilities required to achieve the stated career objectives.
- Discussing and obtaining concurrence of goals, objectives and developmental activities with first-line Managers or team leaders.
- Satisfactorily completing all assigned reading, education and developmental assignments.

## **First-Line Managers or Team Leaders**

First-line Managers or team leaders are responsible for assisting each employee in the development of their IDP and supporting development activities outlined in the IDP. This includes:

- Performing a developmental needs assessment, in cooperation with the employee, to assist the individual in planning and formulating actions to successfully accomplish identified career objectives.
- Counseling employees concerning career development and encouraging employees to set goals to improve their performance through systematic and continuous self-

- development.
- Assuring that developmental activities support the objectives of the IDP.
- Evaluating the development, activities and training completed by each employee.

## **Procedures**

### **Where am I now?**

Conduct a self-assessment to determine current skills, interests and values. In addition to an assessment of current job strengths and areas for improvement, ask questions such as: What do I value? How satisfied am I in my current job? How well does my job meet my needs? If I wanted to make a change, what would it be? How do others see me? How do I want to be seen? What kind of person do I want to be? What makes me happy?

### **Where do I want to be?**

Once you have reviewed your current skills, interests and values, begin to examine the options available. Ask questions such as: Do I want to move up or over to a new organization? Enrich my present job? Develop new skills?

If so, which ones and why?

Talk with Managers and Team Leaders and see what options are available. Interview, collect information, and ask others about their perceptions of you. Do a reality check – match your needs with your options. Think about what the customer needs, how the organization is planning to meet customer needs, and what the demands and risks are.

### **How will I get there?**

After deciding where you want to be, identify developmental areas. Ask questions such as: What specific skills, knowledge and abilities do I possess? What do I strengthen now to meet where I am? What do I strengthen for future assignments?

Determine your barriers? What do I need to overcome the barriers? What is in my way? Where do I need to change? Identify the sources of the barriers and determine the need and actions to overcome them.

## **Competencies**

Achieving career goals is usually met by applying or developing job competencies. Job competency is defined as an underlying characteristic of an employee, i.e., a motive, trait, skill, aspect of one's self image, or a body of knowledge which results in effective and/or superior job performance. It is simple and useful to think of a competency as the ability to perform a task well. Each set of knowledge, skills, and experiences is one competency. Employees use many competencies in their jobs, and changing jobs requires employees to master new competencies.

Competencies can generally be broken down into three major categories: business management, professional, and technical. Business management competencies are related to common business management practices and techniques. These competencies could include contract management, accounting, marketing, project management, and

other business skills. Professional competencies represent basic personal and analytical skill needed to perform the job. These competencies could include communication, facilitation, mentoring, problem solving, leadership, and other interpersonal skills. Technical competencies include specific skills and abilities related to performing the functions or processes of the job. These competencies could include craft skills, such as bricklaying and carpentry, or specific knowledge in a particular area of expertise, such as property management and inventory processes.

## **What is my current level of job competency?**

You may want to conduct a job analysis to determine exactly what job-related tasks are necessary for successful performance of the job. These tasks can then be used to identify the specific knowledge, skills, and abilities needed. Once identified, the employee and the Manager can determine the areas within which improvement is needed. Ask questions such as:

Why does the job exist? What is its purpose? What are the major duties and responsibilities involved? What special requirements are necessary or helpful to know?

## **Employee Checklist for Preparing an Individual Development Plan**

### **Identification of Personal Goals**

1. Identify the assignments or job duties you would like to complete this year.
2. Define your short-range (1 year) goals.
3. List future activities that you would like to accomplish.
4. List possible career paths open to you (e.g., staffing specialist, team leader, program manager).
5. Define your long-range (1-3 years) goals.
6. Ask yourself: Are my goals realistic? How strong is my desire to achieve these goals? Are my goals compatible with my strengths and weaknesses? Are my goals compatible with the parts of my job that I like and dislike?

### **Identification of Organizational Goals**

1. Identify organizational core competencies.
2. Identify career field core competencies and career ladders
3. List long-range training opportunities that provide rotational assignments or developmental assignments outside your chosen career.

### **Identification of Objectives**

1. Read your job description.
2. Read your most recent performance appraisal.
3. Read your office/division mission and function statement.
4. List specific job activities that you enjoyed in the past year.
5. List specific job activities that you did not enjoy in the past year.
6. Identify elements of your job where you excel.
7. List those elements of your job where you believe performance could be improved.
8. List those activities within your office/division that are interesting to you.

## **Identification of Development Activities**

1. List the ten most common tasks that you perform. (Tasks are single activities that cannot be meaningfully broken down into smaller elements.)
2. Identify the knowledge, skills and abilities that are needed to perform each task.
3. Identify and prioritize the knowledge, skills and abilities you do not have or those you need to strengthen.
4. Identify short-term development activities that will help you acquire the needed knowledge, skills and abilities.
5. List the knowledge, skills and abilities needed to improve your performance.

## **Manager Checklist for Reviewing Individual Development Plans**

### **Reviewing the IDP:**

1. Are the employee's goals realistic based on your assessment of the employee's capabilities and past performance?
2. Are the employee's goals consistent with our office/division needs, core competencies, and organization goals?
3. Do the proposed development activities support the employee's goals?
4. Has the employee considered a full range of potential developmental activities, including self-study, on-the-job training, seminars, workshops, professional society meetings and conferences, details, and special assignments?
5. Do the developmental activities address performance improvement areas noted in the most recent performance appraisal?
6. Are any additional developmental activities needed to address upcoming changes in responsibilities and planned assignments or to maximize cross training of the staff?
7. Is the level of proposed developmental activities reasonable given the anticipated workload?
8. Are proposed developmental activities within the employee's capabilities?

### **Analysis of Organizational Needs**

1. Thinking from the perspective of the organization as a whole, and of your specific Managerial perspective, what are the organization's needs and objectives, now and in the future?
2. What are the functions and tasks that must be accomplished in your organization's daily work if it is going to meet those objectives?
3. What competencies are needed among your staff to accomplish these functions and tasks?
4. What competencies do each of the individuals within your span of control possess?
5. What are the gaps between competencies needed, and the competencies now present in your organization?
6. In what ways can you bring the required competencies that already exist to bear on the functions and tasks that must be accomplished?
7. What competencies should each individual develop from the organization's point of view? From the employee's point of view?

IDP objectives result from negotiation and mutual agreement. Managers act on behalf of the organization to ensure that development or application of the targeted competencies is needed by the organization. Employees act on their own behalf to ensure that developing or more fully utilizing the targeted competencies will result in greater satisfaction with their work and enhanced potential for career progression.

## Developmental Activities

Developmental activities are undertaken by an individual to achieve a developmental objective. Some objectives may be achieved by the familiar means of formal training and attending events such as conferences and seminars. However, the skills, knowledge and abilities that comprise many competencies may be better-learned and practiced by means of other activities. Activities other than formal training classes or attending meetings that are appropriate for IDPs include the following:

Shadowing (following and observing a person closely)	Reading
Reviewing and analyzing examples	Research
Internship, apprenticeship	Correspondence courses
On-the-job training	Self-study
Video or computer based instruction	Mentoring
Special projects/assignments	"Just doing it"
Structured interviews with content experts	Rotational assignments

In most cases, these activities are not as expensive as formal training. They can often be accomplished without travel while on the job.

## Implementing The IDP

### Employee's Responsibilities

Completion of the IDP acknowledges the employee's commitment to accomplish the planned training and development. To implement the plan effectively, three actions are required on the employee's part:

**Documentation:** Formal training and developmental activities that involve exchange of funds, official time or both must be documented.

**Participation:** Once the request for training is approved, it is up to the employee to carry through with the experience. The Manager will support and guide the employee, but the primary responsibility for successfully reaching the goals rests with the employee. It will take time to reach your goals, but the long-term investment will be worth it.

**Evaluation:** Just taking a course or being involved in a developmental assignment does not necessarily mean the employee has fully met his/her commitment. Training and development needs are identified primarily to enable one to perform with greater ease and efficiency on the job.

### Manager's Responsibilities

- Periodically reassess employee's plan,
- Meet with employee after each training and developmental activity and
- Make periodic written evaluations of how the training and development activities have affected the employee's performance.

## Reviewing or Revising an IDP

An IDP is a plan for development, not a contract in stone. IDP's should be reviewed, revised or both as follows: at progress reviews of the performance plans, upon completion of training and altered as performance plans and job assignments change.

## Tips for First-line Manager or Team Leader

Employees use IDPs to maintain and improve their employability and thus advance their careers. However, the Manager uses IDPs to enhance the organization's ability to achieve its objective, both now and in the future. Specifically, Managers use IDPs to encourage employees to enhance their competencies and to make the best use of their competencies. Hence, IDPs include objectives to improve knowledge and skills and to build experience that will be used to benefit the organization as a whole. The responsibility also includes assigning work to employees that allows them to make a maximum contribution to mission accomplishment.

However, in a more general sense, the Manager's responsibility is to recognize that employees are the organization's greatest assets, and to help develop these assets. That development is not limited to near term organizational needs and requirements. It takes into account the organization's longer range needs, and the need to help every employee maintain optimism and sustain motivation that leads to doing the best possible job every day. The organization relies primarily upon Managers to make this happen. Fulfilling this role requires a willingness to invest in people. It also requires an understanding of the organization's:

- Goals
- Needs
- Functions
- The competencies needed to accomplish the functions
- The competencies possessed by the individuals in the Manager's human resource pool

A plan for using and developing available resources that takes into account where individuals are now, and where they can be in the short-term and long-term future. This approach does more than identify knowledge and skills employees must learn. It seeks ways to change and add assignments to allow the development and practice of unused or undeveloped competencies. It takes the broad view across the organization and the long view over the coming years in imagining and evaluating career development. It empowers and motivates individuals to produce and grow, and to serve the organization at the same time they are building their careers.

## Definitions

a. **Classroom Training.** Structured learning that takes place in a classroom setting. Classroom training varies in format and type of activity depending upon content and time available. Classroom training is generally most effective when followed by on-the-job or laboratory experiences that reinforce learning and provide opportunities for practice.

b. **Computer-Based Training (CBT).** Structured learning that is self-paced and takes place at a personal computer. CBT can play a key role in closing skill gaps and improving on-the-job performance. CBT is extremely versatile, and permits employees to use their time most efficiently, because they are not required to spend the entire day in a formal classroom. CBT also halts the loss of knowledge, because the organization owns the training resource, and it is available for training or review at any time. CBT includes CD-ROM, and web-based training.

c. **Contextual Learning.** Contextual knowledge is learning that occurs in close relationship with actual experience. Contextual learning enables students to test theories via tangible real world applications.

- d. **Competency Profile.** A list of knowledge, skills, and abilities that can be linked to specific job tasks.
- e. **Distance Learning.** Any approach to education delivery that replaces same-time, same-place face-to-face environment of the traditional classroom.
- f. **Distributed Learning.** A type of distance learning that is technology enabled, learning-team focused, facilitated by a content expert, and delivered anytime and anywhere.
- g. **Developmental Activity.** Training, education, or other developmental assignments (e.g., reading reference material) that expand upon the knowledge, skills, and abilities to perform current and future duties, and accomplish developmental objectives.
- h. **Development Needs Assessment.** A systematic process by which the Manager and employee identify the employee's specific developmental activities and priorities based on a review of the position description, job analysis, performance appraisal, organizational goals and objectives, and analysis of the employee's experience, training history, and career developmental goals.
- i. **Development of Job Aids.** Formulating a list of procedures, list of references, or other brief documentation targeted to help the individual more effectively perform a job or task.
- j. **Goal.** A goal is something pertinent to your work and career aspirations, such as mastering a skill in your current job or attaining a higher position. The goal should imply some work and challenge, but it should not be so high that it cannot be reasonably obtained. Short-range goals are planned to be accomplished within 1-2 years, and long-range goals are planned to be accomplished with 3-5 years.
- k. **Learning Objective.** A summary of knowledge, skills, and abilities the employee will be expected to achieve.
- l. **Individual Development Plan (IDP).** The IDP is an individually tailored written plan developed by the Manager and employee outlining the employee's developmental objectives and the developmental activity for achieving these objectives. The purpose of an IDP is to increase the current proficiency, development, and progression of the employee through a systematic development plan.
- m. **Knowledge, Skills, and Abilities.** Knowledge is an organized body of information, usually of a factual or procedural nature. Skill is the proficient verbal or mental manipulation of data, people, or things that are observable, quantifiable, and measurable. Ability is the power to perform an activity at the present time. Generally, skill pertains to physical competence; knowledge pertains to the mastery of a subject matter area, and ability pertains to the potential for using knowledge or skill when needed.
- n. **Objective.** A developmental objective, for the purposes of the IDP, is something pertinent to the employee's work and career and is worthwhile to obtain. Developmental objectives should be as specific as possible (e.g., to learn to evaluate computer systems with multilevel security features).
- o. **On-the-Job-Training (OJT).** Training that is conducted and evaluated in the work environment.

- p. **Reading or Research Project.** Review of specified set of reading on a topic or the completion of a research project and resulting report.
- q. **Rotational Assignment/Detail.** Temporarily placing an individual in a special job where he or she has the opportunity to learn and develop specific skills needed for his or her regular job.
- r. **Self-Study Program.** Learner-controlled experience generally involves the use of prepared materials and a self-paced structure with options for sequencing and level of detail required. This type of activity is appropriate when self-study materials are available, numbers of people needing the training are small, individual backgrounds and needs vary and an individual will benefit from a customized schedule of instruction. This type of activity is also appropriate when large numbers of individuals need training but cannot be easily assembled in the same place at the same time. Subject matter that is enhanced through the synergism of training participant interaction is not recommended as part of a self-study program.
- s. **Shadowing.** Learning through first observing the work of a qualified individual and then practicing the application of the same skill or set of skills followed by feedback and evaluation.
- t. **Simulation Training.** The application of classroom or other learning in a realistic but not actual situation in which the participant can practice skills. Simulation training may involve the use of specialized equipment or, in some cases, scenarios and role playing.
- u. **Structured Discussion.** Working with a mentor or other individual to learn about a specified topic through discussion. The structure might include preparation of questions for discussion or prerequisite reading or other research.
- v. **Symposium/Conference/Workshop/Seminar.** Any of a variety of events focusing on a specific topic or area of concern.
- w. **Task Force or Committee.** Serving as a member of a task force or committee for the purpose of gaining knowledge and/or experience in a particular area of expertise.