

Individual Development Plan (IDP)

— Overview and Preparation —

IDP Created for: _____



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Individual Development Plan (IDP) Overview

Definition

An individual development plan (IDP) is defined as:

A tool to assist employees in career and personal development. Its primary purpose is to help employees reach short and long-term career goals, as well as improve current job performance. An IDP is not a performance evaluation tool or a one-time activity. It should be looked at like a partnership between the employee and the supervisor. It involves preparation and continuous feedback.

Source: U.S. Office of Personnel Management

Process

The IDP process utilized here is based on the following model:



Adapted from *The Six Readiness Factors for Planning, Changing, or Advancing Your Career* by Donald Whiteside
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This IDP process model consists of five sequential phases:

- | | | |
|------|---|--|
| I. | Identify/Update Career Goals | Identify and clearly articulate career or development goals. |
| II. | Research & Identify Required Qualifications | Identify the qualifications necessary to attain the goals or level of development as they relate to the areas of Education, Experience, Skills, and Credentials. |
| III. | Assess Current Readiness Level | Assesses the current state of readiness for each required qualification. |
| IV. | Identify & Perform Actions Necessary to Achieve Readiness | Identify and perform the action(s) necessary to meet the qualifications. |
| V. | Actively Pursue & Achieve Goals | At an appropriate level of readiness, actively pursue and attain the identified career or development goals. |

The overall timeframe required for attainment of goals will vary based on the unique characteristics of the career involved and the degree to which an employee may already have some preparation. It would not be uncommon for an IDP to span approximately three to five years; of course, the timeframe may be adjusted to that which is realistically needed and mutually agreed upon by the employee and supervisor. However, in order to avoid creating an overly complex and lengthy IDP, goals involving a longer timeframe (e.g., five years or more) may be better served by utilizing a successive series of shorter-term IDPs.

It is recommended employees and supervisors meet at regularly scheduled intervals consistent with the needs of the IDP, typically quarterly, to discuss plan progress, resolve any issues, and as an opportunity for open dialogue.

Special notes for supervisors:

- IDPs, by definition, develop employees so they may reach their career goals. Supervisors may therefore find it somewhat disconcerting that as a potential consequence an employee may eventually need to leave the supervisor's work area in order to realize those goals. While "training someone just so they can leave" may seem counter-productive, remember a supervisor also has a responsibility and obligation to develop human resources for the purposes of organizational sustainability. In order for an organization to survive, it is critical to have well-prepared human resources ready and able to potentially fill future job openings or leadership positions which will inevitable arise. Additionally, an immediate benefit to supervisors is that current employees who see themselves being developed may be more motivated and have higher morale, and

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the knowledge and skills gained through an IDP may translate into improved on-the-job performance.

- The goal of an IDP is *development*, and therefore the focus of developmental activities should not be limited to only those useful to an employee in his or her current position. *Exception:* Some employees are sincere in their desire to not seek advancement, promotion, or to change careers. For these individuals, identifying mutually agreed upon developmental activities which expand or enhance the knowledge and skills needed for their current positions would be both appropriate and beneficial.
- An employee who is uncooperative and adamantly opposed to participating in an IDP should not be forced to do so; however, such a stance may be a symptom of other problems which need to be addressed.
- An IDP should not be included as part of an employee's job performance review or evaluation.
- An IDP is not to be used as any part of a disciplinary process to correct poor job performance or for corrective/remedial skill development.

SMART Guidelines for Goals

Any goal, whether an overall career goal, developmental goal, or even an action item must meet the following criteria in order to be effective (commonly known as "SMART"):

- **Specific** The goal must be stated clearly; avoid general statements.
- **Measurable** Progress toward goal completion must be able to be measured and it must be possible to determine when the goal has been met.
- **Attainable** Adequate resources (time, funding, opportunity, equipment, etc.) must exist and be available in order for the goal to be realistically attainable.
- **Relevant** The goal must be directly relevant to and consistent with the development of the employee.
- **Time-Based** Goals must have a realistic timeframe for completion, and a target completion date must be stated.

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Instructions for Use

Phase I - Identify/Update Career Goals

Section A

If an individual is undecided regarding career goals, action items should be identified which assist in determining potential options. Such action items might include opportunities to interact with other areas within the organization; although various names may be used and different definitions may apply, these activities might be known generically as “day on the job” or “job shadowing.” The purpose of such activities is to give an employee exposure to areas and operations in the organization which might not otherwise normally be experienced or accessible. This exposure and resulting awareness may enable an individual to identify a career path which had not been previously known or understood, and therefore would never have been considered.

Individuals who have already decided on career goals may omit Section A and proceed to Section B.

Documentation of Acceptance and Completion

Each action item contains a designated field for both the employee and supervisor to initial (or sign) indicating their *acceptance* of the identified item and to later document its date of *completion*. This approach helps ensure both parties have discussed and agreed upon the action item during its inception and to document acknowledgement by both parties when the action item has been successfully completed.

Acceptance and completion fields will be used in a similar manner throughout the IDP.

Section B

For employees who have already decided on career goals, Section B may be used for documentation. Being able to *write* a goal is important; if a goal cannot be clearly articulated, then the goal itself is likely not clearly understood or well-developed. Writing goals in an unambiguous manner helps ensure both the employee and supervisor have a clear and common understanding.

Phase II - Research & Identify Required Qualifications

In each section of Phase II, research and identify the qualifications necessary to achieve the goals identified. For developmental goals, identify the qualifications which indicate a desired level of development has been achieved. The identified qualifications are placed into the categories of Education, Experience, Skills, and Credentials. The employee and supervisor should work together to identify the qualifications or developmental items.

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Qualifications may be found in the job postings or position descriptions in the selected career field. When well-written, these documents state and detail the required level of education, amount of experience, skill types, and credentials.

Education (and training) refers to formal education (such as college courses or degrees), but may also refer to specific non-credit classes which may be required. For example, an employer may require an applicant to have completed a training class offered by a manufacturer on a particular machines or piece of equipment, or completion of certain classes may be necessary to pursue licensure in certain fields.

Experience refers to actual hands-on, on-the-job performance of duties. Training or internships (paid or unpaid) may or may not be considered as “experience” by some employers; this typically varies by field or employer.

Skill is different from education or training in that merely taking a class does not necessarily ensure ability and competency; skill is usually developed after repeated practice and sufficient hands-on experience. Skills may be technical in nature (such as in electronics, clinical/medical, math or statistics, computers, or machining), or could relate to “softer skills” such as the ability to communicate effectively (in writing, public speaking, developing presentations, interpersonal, etc.). Some careers and positions (such as law enforcement and firefighting) typically require certain physical abilities, and these should be included in this category as well.

Credentials, as the term is used here, refers to licensing or certification requirements which are typically expected, highly desirable, or legally required in some fields. Applicable federal, state, or local regulatory agencies, or entities which issue certification, etc. are good resources to use for more information.

Phase III - Assess Current Readiness Level

For each qualification identified in Phase II, use applicable criteria or methods to perform a self-assessment to determine the current state of readiness. A subjective but simple “None - Low - Medium - Ready” scale is provided to provide a visual record of the assessment results. The “Low” rating should be assigned when only minimal progress toward meeting the qualification has currently been attained. The “Medium” rating should be assigned if significant progress has already been made toward meeting the qualification at the time of the assessment. The “Ready” rating is to be assigned only if the specific qualification has already been fully met and no further action will be necessary. The Phase III assessment and rating processes are one-time activities. The results in Phase III are not updated later as progress is made; these findings are intended to help drive the decisions necessary in Phase IV. Completion of readiness will be documented in Phase IV.

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Phase IV - Identify & Perform Actions Necessary to Achieve Readiness

For each qualification which has not yet been fully met, identify the action(s) necessary. Such actions might include completion of a college degree, taking specific classes or training courses, arranging and scheduling opportunities to gain new or additional experience, the development or enhancement of selected skills, and actively pursuing credentials where applicable.

Phase V - Actively Pursue & Achieve Goals

Phase V of the IDP needs to be highly flexible in its structure and should be customized as necessary for specific career fields and individual situations. This phase may not be applicable for IDPs which involve only developmental goals. It is primarily intended for those career goals which involve the pursuit of promotional opportunities and positions within the current career, or when changing careers altogether.

Action items which may be considered for inclusion in Phase IV, if not already completed in a previous phase, might include activities such as:

- Preparing effective resumes and cover letters
- Developing and practicing interview skills
- Considering responses to expected interview questions
- Locating applicable resources for job opportunities (internal job postings, websites, etc.)
- Checking the job opportunity resources on a regular basis
- Networking with others

It may not always be necessary to have achieved 100% readiness in order to enter Phase V, and it is possible for Phase V to take place concurrently with Phase IV. Career readiness is usually a matter of degree rather than an absolute, and some employers may be willing to hire or promote candidates who do not necessarily meet every single qualification stated in a job posting. For example, a student who is in the final semester of a degree program may find certain employers willing to hire on the condition the degree is actually received as planned. Similarly, unless a certain license, certification, or other credential is an absolute prerequisite by law, some employers may be willing to hire or promote a candidate on the condition the identified credential is received within a specified timeframe, and in such situations, obtaining the credential within the stated timeframe is typically a requirement for continued employment. Some employers may also be willing to offer an otherwise well-qualified candidate on-the-job training for certain skills, especially if the current applicant pool does not contain individuals with those skills.

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Phase I

Identify/Update Career Goals

Section A – Exploration of Potential Career Options

Identify action items designed to assist in exploring career options and interests. Use additional pages, if needed. This section may be omitted if career goals are already known.

<u>Action Item 1</u> Description: Target Completion Date:	Employee (Initials & Date)	Supervisor (Initials & Date)
	Acceptance	Acceptance
	Completion	Completion
<u>Action Item 2</u> Description: Target Completion Date:	Employee (Initials & Date)	Supervisor (Initials & Date)
	Acceptance	Acceptance
	Completion	Completion
<u>Action Item 3</u> Description: Target Completion Date:	Employee (Initials & Date)	Supervisor (Initials & Date)
	Acceptance	Acceptance
	Completion	Completion
<u>Action Item 4</u> Description: Target Completion Date:	Employee (Initials & Date)	Supervisor (Initials & Date)
	Acceptance	Acceptance
	Completion	Completion
<u>Action Item 5</u> Description: Target Completion Date:	Employee (Initials & Date)	Supervisor (Initials & Date)
	Acceptance	Acceptance
	Completion	Completion

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Phase II

Research & Identify Required Qualifications

Phase II - Research & Identify Required Qualifications

Research job postings, job descriptions, legal requirements, etc. to determine the qualifications necessary to achieve the career goal. For developmental goals, identify the qualifications which indicate a desired level of development has been achieved. Use additional pages, if needed.

<u>Education</u>	Employee (Initials & Date)	Supervisor (Initials & Date)
	Acceptance	Acceptance
	Completion	Completion
Target Date to Complete Identification:		
<u>Experience</u>	Employee (Initials & Date)	Supervisor (Initials & Date)
	Acceptance	Acceptance
	Completion	Completion
Target Date to Complete Identification:		
<u>Skills</u>	Employee (Initials & Date)	Supervisor (Initials & Date)
	Acceptance	Acceptance
	Completion	Completion
Target Date to Complete Identification:		
<u>Credentials</u>	Employee (Initials & Date)	Supervisor (Initials & Date)
	Acceptance	Acceptance
	Completion	Completion
Target Date to Complete Identification:		

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Phase III

Assess Current Readiness Level

Phase III - Assess Current Readiness Level

For each qualification identified in Phase II, use applicable criteria or methods to perform a self-assessment to determine the current state of readiness. Use additional pages, if needed.

<u>Education</u>					Employee (Initials & Date)	Supervisor (Initials & Date)		
1.		None	Low	Medium	Ready	Acceptance	Acceptance	
2.		None	Low	Medium	Ready			
3.		None	Low	Medium	Ready			
Target Date to Complete Assessment:							Completion	Completion
<u>Experience</u>					Employee (Initials & Date)	Supervisor (Initials & Date)		
1.		None	Low	Medium	Ready	Acceptance	Acceptance	
2.		None	Low	Medium	Ready			
3.		None	Low	Medium	Ready			
4.		None	Low	Medium	Ready	Completion	Completion	
Target Date to Complete Assessment:								
<u>Skills</u>					Employee (Initials & Date)	Supervisor (Initials & Date)		
1.		None	Low	Medium	Ready	Acceptance	Acceptance	
2.		None	Low	Medium	Ready			
3.		None	Low	Medium	Ready			
4.		None	Low	Medium	Ready	Completion	Completion	
5.		None	Low	Medium	Ready			
6.		None	Low	Medium	Ready			
7.		None	Low	Medium	Ready	Completion	Completion	
8.		None	Low	Medium	Ready			
Target Date to Complete Assessment:								
<u>Credentials</u>					Employee (Initials & Date)	Supervisor (Initials & Date)		
1.		None	Low	Medium	Ready	Acceptance	Acceptance	
2.		None	Low	Medium	Ready			
3.		None	Low	Medium	Ready			
Target Date to Complete Assessment:							Completion	Completion

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Phase IV

Identify & Perform Actions Necessary to Achieve Readiness

Section A - Education

For each educational qualification identified in Phase III which has not yet been fully met, identify the action(s) necessary. Use additional pages, if needed.

Qualification: Action(s) Necessary: Target Date to Meet Qualification:	Employee (Initials & Date)	Supervisor (Initials & Date)
	Acceptance	Acceptance
	Completion	Completion
Qualification: Action(s) Necessary: Target Date to Meet Qualification:	Employee (Initials & Date)	Supervisor (Initials & Date)
	Acceptance	Acceptance
	Completion	Completion
Qualification: Action(s) Necessary: Target Date to Meet Qualification:	Employee (Initials & Date)	Supervisor (Initials & Date)
	Acceptance	Acceptance
	Completion	Completion

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Phase IV (continued)

Identify & Perform Actions Necessary to Achieve Readiness

Section B - Experience

For each experience qualification identified in Phase III which has not yet been fully met, identify the action(s) necessary. Use additional pages, if needed.

Qualification: Action(s) Necessary: Target Date to Meet Qualification:	Employee (Initials & Date)	Supervisor (Initials & Date)
	Acceptance	Acceptance
	Completion	Completion
Qualification: Action(s) Necessary: Target Date to Meet Qualification:	Employee (Initials & Date)	Supervisor (Initials & Date)
	Acceptance	Acceptance
	Completion	Completion
Qualification: Action(s) Necessary: Target Date to Meet Qualification:	Employee (Initials & Date)	Supervisor (Initials & Date)
	Acceptance	Acceptance
	Completion	Completion
Qualification: Action(s) Necessary: Target Date to Meet Qualification:	Employee (Initials & Date)	Supervisor (Initials & Date)
	Acceptance	Acceptance
	Completion	Completion

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Phase IV (continued)

Identify & Perform Actions Necessary to Achieve Readiness

Section C - Skills		
<i>For each skill qualification identified in Phase III which has not yet been fully met, identify the action(s) necessary. Use additional pages, if needed.</i>		
Qualification: Action(s) Necessary: Target Date to Meet Qualification:	Employee (Initials & Date)	Supervisor (Initials & Date)
	Acceptance	Acceptance
	Completion	Completion
Qualification: Action(s) Necessary: Target Date to Meet Qualification:	Employee (Initials & Date)	Supervisor (Initials & Date)
	Acceptance	Acceptance
	Completion	Completion
Qualification: Action(s) Necessary: Target Date to Meet Qualification:	Employee (Initials & Date)	Supervisor (Initials & Date)
	Acceptance	Acceptance
	Completion	Completion
Qualification: Action(s) Necessary: Target Date to Meet Qualification:	Employee (Initials & Date)	Supervisor (Initials & Date)
	Acceptance	Acceptance
	Completion	Completion

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Phase IV (continued)

Identify & Perform Actions Necessary to Achieve Readiness

Section C – Skills (continued)		
<i>For each skill qualification identified in Phase III which has not yet been fully met, identify the action(s) necessary. Use additional pages, if needed.</i>		
Qualification: Action(s) Necessary: Target Date to Meet Qualification:	Employee (Initials & Date)	Supervisor (Initials & Date)
	Acceptance	Acceptance
	Completion	Completion
Qualification: Action(s) Necessary: Target Date to Meet Qualification:	Employee (Initials & Date)	Supervisor (Initials & Date)
	Acceptance	Acceptance
	Completion	Completion
Qualification: Action(s) Necessary: Target Date to Meet Qualification:	Employee (Initials & Date)	Supervisor (Initials & Date)
	Acceptance	Acceptance
	Completion	Completion
Qualification: Action(s) Necessary: Target Date to Meet Qualification:	Employee (Initials & Date)	Supervisor (Initials & Date)
	Acceptance	Acceptance
	Completion	Completion

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Phase IV (continued)

Identify & Perform Actions Necessary to Achieve Readiness

Section D – Credential		
<i>For each credential qualification identified in Phase III which has not yet been fully met, identify the action(s) necessary. Use additional pages, if needed.</i>		
Qualification: Action(s) Necessary: Target Date to Meet Qualification:	Employee (Initials & Date)	Supervisor (Initials & Date)
	Acceptance	Acceptance
	Completion	Completion
Qualification: Action(s) Necessary: Target Date to Meet Qualification:	Employee (Initials & Date)	Supervisor (Initials & Date)
	Acceptance	Acceptance
	Completion	Completion
Qualification: Action(s) Necessary: Target Date to Meet Qualification:	Employee (Initials & Date)	Supervisor (Initials & Date)
	Acceptance	Acceptance
	Completion	Completion

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Phase V

Actively Pursue & Achieve Goals

Phase V - Actively Pursue & Achieve Goals		
<i>Identify and perform action items for the active pursuit of career goals. Use additional pages, if needed.</i>		
<u>Action Item 1</u> Description: Target Completion Date:	Employee (Initials & Date)	Supervisor (Initials & Date)
	Acceptance	Acceptance
	Completion	Completion
<u>Action Item 2</u> Description: Target Completion Date:	Employee (Initials & Date)	Supervisor (Initials & Date)
	Acceptance	Acceptance
	Completion	Completion
<u>Action Item 3</u> Description: Target Completion Date:	Employee (Initials & Date)	Supervisor (Initials & Date)
	Acceptance	Acceptance
	Completion	Completion
<u>Action Item 4</u> Description: Target Completion Date:	Employee (Initials & Date)	Supervisor (Initials & Date)
	Acceptance	Acceptance
	Completion	Completion
<u>Action Item 5</u> Description: Target Completion Date:	Employee (Initials & Date)	Supervisor (Initials & Date)
	Acceptance	Acceptance
	Completion	Completion

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