**Individual Development Guide**

**How to Create an Individual Development Plan**

**What**

An Individual Development Plan (IDP) is an action plan used to leverage your employees’ *current* strengths and talents, and to help them identify and develop *new* skills and behaviors. Its primary purpose is to help your employees’ improve their current job performance and to reach their short and long-term goals. The IDP fulfills the mutual goals of individual career development and organizational enhancement by aligning employee development with your company’s mission and goals.

**Why**

Reason 1: Both you and your employees have professional and personal goals. Your employees will need your help to learn, grow and develop in order to reach their goals. The IDP is a roadmap for you to use to assist your employees.

Reason 2: We live in a dynamic world. Today’s expert must continue to build knowledge and skills to be tomorrow’s expert. An IDP helps you and your employees stay ahead of the curve so you can both thrive in our changing workplace both today and tomorrow.

**Who**

Your employees are responsible for their professional development and career track. However, they will need your support both in identifying appropriate goals and developmental opportunities, and in acquiring necessary resources. How quickly your employees accomplish their goals is determined by their commitment and actions.

**When**

The IDP is revised once each year. During the year, you discuss progress with your employee, adjust as necessary, and celebrate their successes.

**How**

Your employees will follow the steps listed below to complete their Individual Development Plan. This document will lead you through those steps, preparing you to help your employees create IDPs that benefit both the employee and your company.

1. Think it Through

2. Identify Development Goals

3. Determine Steps to Reach Your Goal

4. List Potential Obstacles

5. Identify Necessary Resources

6. Define Measures of Success

7. Create a Schedule of Checkpoints

8. Set Deadlines

9. Record Outcomes/Comments

10. Revisit and Evaluate

**Step 1: Think it Through**

A successful IDP requires preparation and continuous feedback. The questions below will help you to guide your employees in assessing where they are, where they want to be and how they will get there, all the while matching their individual professional goals with your company’s goals. For this exercise, select one employee that you will be working in partnership with to create their IDP. Think about their current role and respond to the questions below.

1. Identify three to five tasks or responsibilities at which your employee consistently excels. Be prepared to share examples with your employee.
2. Identify three to five tasks or responsibilities in which you feel they need to improve. Why? What would be the impact? Be prepared to share examples with your employee.
3. Identify one to two *specific behaviors* that you feel your employee needs to demonstrate or change in order to in order to be more successful both now and in the future. Why? What would be the impact? Be prepared to share examples with your employee.
4. Consider what your employee needs to improve in their current role and what they need to develop to ensure future success. In the chart below:

* List the knowledge, skills, and capabilities you know your employee does not have. Be specific: What does your employee need to acquire?
* List the knowledge, skills, and capabilities you need to strengthen. Be specific. What does your employee need to expand?
* Working with your employee, select the most critical developmental needs. These are their developmental priorities. Place a checkmark next to these items.

|  |  |  |  |
| --- | --- | --- | --- |
| |  | | --- | | **Knowledge, Skills and Capabilities to *Acquire*** | | |  | | --- | | **Knowledge, Skills and Capabilities to *Strengthen*** | |
|  |  |

**Step 2: Identify Development Goals**

Review your employee’s developmental priorities identified on the previous page. With your employee, select two to three to focus on this year. These are their development goals. Your employee will record these on their IDP form.

For each goal, help your employee to record specifically what they will do or accomplish when they have developed these areas. Ensure that each goal is SMART.

**S** Specific

**M** Measurable

**A** Attainable

**R** Realistic

**T** Time bound

**Step 3: Determine Steps to Reach Your Goal**

Work with your employee to identify steps that will help them accomplish each goal. Steps might include additional training, and should focus primarily on on-the-job experiences. (For suggestions, see “Ideas for Developmental Opportunities” at end of this document.) Your employee should have several tasks to accomplish for each goal and the tasks should move from easier to more difficult. For example, a goal around presentation skills might include role playing a presentation, to making a presentation to a small group of known people and finally a formal presentation to a larger group. Your employee will record the steps on their IDP in the “Steps to Reach My Goal” column.

**Step 4: List Potential Obstacles**

With your employee, discuss and identify any obstacles that may prevent them from accomplishing the goal or the steps to reach the goal. An obstacle might be limited time, people (access to or difficulty in working with), or lack of resources. Your employee will record the obstacles on their IDP in the “Obstacles” column.

**Step 5: Identify Necessary Resources**

Work with your employee to identify resources they will need to overcome potential obstacles and to achieve each goal. Resources might include people, time, money, equipment, technology, training, coaching, etc. Discuss how these resources can be provided, who can provide the resources, and when they can be provided. Your employee will record the resources on their IDP in the “Resources” column.

**Step 6: Define Measures of Success**

Work with your employee to determine what method of measurement will be used to evaluate their progress towards reaching their goal. Sample options include observation, quantitative results, requested feedback from internal customers, peers and other managers and supervisors. Your employee will record the measurement on their IDP in the “Success Measures” column.

**Step 7: Create a Schedule of Checkpoints**

With your employee, determine specific meeting dates, times and locations to discuss progress towards reaching their goals. Your employee will record the schedule of checkpoints on their IDP in the “Checkpoints” column.

**Step 8: Set Deadlines**

Jointly identify the deadline for each step in reaching your employee’s goals, including the final due date. Your employee will record the deadlines on their IDP in the “Deadline” column. They will then finalize their IDP, make a copy for themselves and another for you.

**Step 9: Record Outcomes/Comments**

Once completed, use the outcomes/comments section to capture thoughts and discussions on goal progress and completion.

Step 10: Revisit and Evaluate An IDP is not a performance evaluation tool or a one-time activity. It is intended to be a partnership between you and your employee. It requires continuous feedback and evaluation of the usefulness of the training and development experiences. The IDP allows your employee to continue to build knowledge and skills that will allow them and consequently your company, to thrive in the changing workplace. Some things you might do with your employee to revisit and evaluate their IDP include:

* Allow them to post their IDP where it is visible.
* Once a month, revisit their progress. Help them to record data sources to determine progress and identify areas where more attention may be necessary. Coach them to determine the specific actions they will take during the upcoming month.
* Once a month, look for areas where priorities might have changed, goals may have shifted, or additional resources, strategies, or tools may be available. Schedule time with your employee to discuss your ideas.
* Celebrate your employee’s accomplishments throughout the year.

**Ideas for Developmental Opportunities**

**Job Enrichment:** Assume more responsibility; execute higher level tasks that were previously done by someone with more skill or experience.

**Individual or Team Assignments:** Complete specific assignments designed to build knowledge, skills and competencies. Work on a team to learn from peers and experience real-life problem-solving.

**Temporary Replacement, Job Rotation:** Relieve others when they are on vacation, sick leave or leave of absence. It helps enrich understanding of how the organization functions.

**Assessments of Style or Skill:** Participate in leadership assessments to help gain more self-awareness and a clearer understanding of interpersonal dynamics, communication style, and leadership impact.

**Meetings:** Look for opportunities to lead meetings (presenting at quarterly staff meetings is a good way to hone your presentation skills.)

**Higher Level Meetings:** With your manager’s approval, observe meetings and brainstorming sessions within your organization.

**Experts:** Schedule time to talk with and shadow experts, whether in your organization or another organization.

**Training Courses:** Participate in training courses offered inside and outside your organization. Enroll in College & University Courses, Webcasts and Webinars, MOOCs (Massive Open Online Courses – sites for free education through elite universities.)

**Internet:** Use tools and resources available online, such as TED Talks, YouTube, podcasts, and online professional discussion groups.

**Books and Articles:** Read respected books and articles to learn about your developmental areas.

**Mentor/Coach:** Identify a possible mentor or coach that is not your manager. Build a relationship and engage this resource to get feedback and support as you focus on your professional and personal development.

**Technical/Professional/Developmental Associations:** Participate in an association dedicated to your profession. Volunteer for leadership and other interesting positions within this organization. Join organizations that feature member development, such as Toastmasters.

**Extracurricular Opportunities:** Seek opportunities in your outside interests to build skills such as teaching a class, giving presentations, or running meetings. Examples include PTA, your church, or a club.