UNIVERSITY OF CALIFORNIA
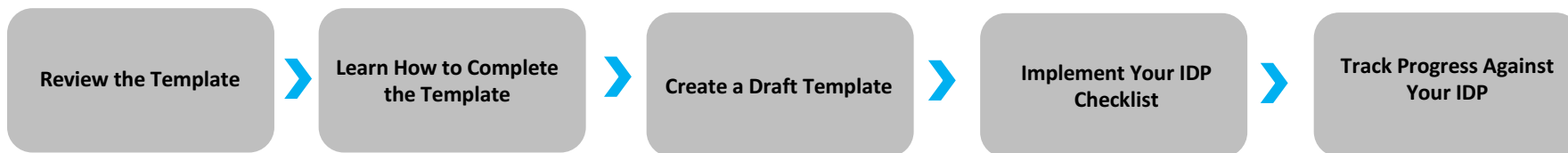MERCED

Staff Guide: Building and Using an IDP

Instructions:
Use the resources in this guide separately, or in conjunction, to help you create an IDP, implement it, and track your progress against it.

Steps for This Guide:

| Review the Template | > | Learn How to Complete the Template | > | Create a Draft Template | > | Implement Your IDP Checklist | > | Track Progress Against Your IDP |

Staff Guide: Building and Using an IDP

Review the Template

Instructions: Complete the template below with your manager to define and document development goals, how to achieve them, and how to know when you have succeeded.

Development Goal	Skill Being Developed	Action Steps	Success Measures	Target Completion Date	Date of Next IDP Review
Goal #1		1. 2. 3.	1. 2. 3.		
Goal #2		1. 2. 3.	1. 2. 3.		
Goal #3		1. 2. 3.	1. 2. 3.		

Employee Name: _____ Manager Name: _____

I have read and discussed my IDP with my manager.
Staff Member Signature:_____

I have read and discussed my IDP with my direct report.
Manager Signature: _____

Learn How to Complete the Template

Individual Development Plan Template

| Which skill do I need to develop? | How will I develop this skill? | How will I know if I have achieved the goal? |

Development Goal	Skill Being Developed	Action Steps	Success Measures	Target Completion Date	Date of Next IDP-Pullup
Goal #1		1. 2. 3.	1. 2. 3.		

Development Goals
- Include both strengths and development areas
- Are tied to performance goals

Action Steps
- Are taken by the employee **and by the manager (e.g., coaching)**
- Approximately 80% of action steps should tie to your current job assignments and responsibilities; less than 20% should be formal classroom or online training

Success Measures
- Set the expectation for gradual, realistic growth
- Are easily visible and therefore, measurable

Staff Guide: Building and Using an IDP

Learn How to Complete the Template

Instructions: Despite including target completion timelines on IDPs, it is often challenging for employees to achieve their development goals without added structure. Keep in mind the following tips, and then give your direct report the framework at the bottom of the page to help establish milestones and achievable timelines for his/ her development goals.

Tips to Get Started:

Consider Current and Desired Skill Level

Take stock of your current abilities as you begin to identify milestones. Ask yourself the following questions:

1. What steps would I expect someone to take to reach this development goal?
2. What activities would indicate growth in this skill area?

Think About the Time It Takes to Complete Each Step

Each milestone builds on its predecessor. As you identify target completion dates, consider the following:

1. How long will it take someone to demonstrate competence at this activity?
2. Is the timeline challenging yet achievable?

Development Goal	Skill Being Developed	Action Steps	Success Measures	Target Finish Date
Be able to present project findings to the senior leadership team	Communication	1. Network with speech "guru" to learn presentation tips 2. Work with team to develop script highlighting project findings	1. Present half of scripted speech to peers; let co-presenter handle Q&A session 2. Present fully scripted speech to peers; handle Q&A 3. Present speech in its entirety to function's senior leadership team	1. 3 Months from now 2. 9 Months from now 3. 1 year from now

Staff Guide: Building and Using an IDP

Create a Draft Template

Instructions: Complete the template below to define and document development goals, how to achieve them, and how to know when you have succeeded.

Employee Name:			Manager Name:		
Development Goal	**Skill Being Developed**	**Action Steps**	**Success Measures**	**Target Completion Date**	**Date of Next IDP-Review**
Goal #1 Be able to present project findings to the senior leadership team	Communication	1. Network with speech "guru" to learn presentation tips 2. Work with team to develop script highlighting project findings	1. Present half of scripted speech to peers; let co-presenter handle Q&A session 2. Present fully scripted speech to peers; handle Q&A 3. Present speech in its entirety to function's senior leadership team	1. 3 Months from now 2. 9 Months from now 3. 1 year from now	
Goal #2		1. 2. 3.	1. 2. 3.		
Goal #3		1. 2. 3.	1. 2. 3.		

Staff Guide: Building and Using an IDP

| Implement Your IDP | **Instructions:** Pair with a partner and take turns asking each other the following questions. Discuss your answers and make alterations to your draft IDP, if necessary. |

Development Plan Checklist	
Development Goals	❑ Have I shared the plan with my manager and incorporated his/her feedback?
	❑ Do I focus on the skills I'll need to successfully do my job now and those I'll need to achieve my career goals?
	❑ Do I focus on continuing to build my strengths at least as much as I focus on closing any gaps?
	❑ Does this development plan push me to the edge of my "comfort zone"?
Action Steps	❑ Have I identified a clear action plan that will help me reach my development goals?
	❑ Have I made sure that at least 80% of my action steps are tied to my day-to-day job responsibilities and project assignments and fewer than 20% are training programs?
Success Measures	❑ Have I shared my development goals with others so I can measure progress along the way?
	❑ Have I created realistic and achievable metrics to measure my progress?
	❑ Have I tied the metrics to realistic deadlines to assess my progress?
	❑ Have I created milestones to ensure I'm on track?

Staff Guide: Building and Using an IDP

**Track Progress Against
Your IDP**

Instructions: Use the following tips to ensure that your development plans are relevant and reflect the skills and capabilities you want or need to build.

✓ **Set up Meetings with Your Manager**: At the end of the day, it's *your* development and *your* career. You are responsible for proactively ensuring that your development is in line with your own performance expectations or career aspirations.

✓ **Take the Time to Review Your Plan Before You Meet with Your Manager:** As you examine your development plan, ask yourself the following questions:
  • Do I have to set new goals or milestones because I reached the old ones?
  • Are my milestones or goals still achievable, or do I need to readjust the timeline?
  • Have I had any changes in my projects or job responsibilities that make any of my development areas irrelevant?
  • Have new strengths or development opportunities come to light that would serve as better areas of focus for our efforts?
  • Can I provide my manager with concrete examples as I make the case for amending my development plan?

✓ **Send Your Manager Any Major Changes in Advance**: Don't surprise your manager with major changes during the meeting. Give him or her the opportunity to review your proposals. It could be that you are in complete agreement, or it could be that your manager perceives your progress differently. Either way, advance warning provides for a more constructive discussion about your development.

✓ **Leave the Meeting with a Balanced Plan**: Make sure you leave all meetings with a firm belief that your plan balances current performance expectations with future career aspirations and challenges you to build on your strengths and development areas.

✓ **Review Where Your Manager Can Provide the Most Help:** Take the time to review your discussions to date, and see if they have aligned with your development areas. If you wish to make changes to your development plan, you should be prepared to discuss how your manager can best help you achieve any new goals.