



Office of Disaster Assistance



Guidebook

Individual Development Planning

General Guidelines for Employees and Managers

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Introduction

This guidebook explains the responsibilities of the employee and supervisor 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 supervisor. As the Plan is built, the employee and supervisor will outline developmental objectives and career goals. The employee and supervisor will also select learning activities for achieving these objective and goals.

The IDP has multiple benefits. 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 workforce planning needs.

IDPs are **REQUIRED** for the following SBA- ODA employees beginning in FY2010:

- Permanent Full-time
- Cadre Full-time
- SES Candidate Development Program Participants
- Presidential Management Fellows (PMF)
- Student Career Experience Program Participants (SCEP)

Note: * Although an IDP is not required for all employees, creating a plan is highly encouraged. For new full-time permanent and cadre employees an IDP is required 90 days after the employee reports for duty.

This Guidebook will help employees:

- Analyze career goals and objectives
- Learn how to prepare a formal Individual Development Plan (IDP)
- Analyze the organization's needs for individual development planning
- Prepare for the employee-supervisor IDP discussion
- Find and use resources for individual development planning

What is an IDP?

IDPs are individually tailored action plans and describe short and long term goals and activities for the employee's career development. An IDP also identifies the training and other developmental experiences needed to achieve those goals, for the benefit of the individual and organization, within a specified time frame.

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, workforce planning, and strategic planning. Competent employee performance, plus the added bonus of improved morale, and personal job satisfaction can make the organization more

effective.

The Individual Development Plan (IDP) employs a concept that emphasizes discussion and joint decisions by the employee and the supervisor, with input from mentor(s), on the specific developmental experiences necessary to fulfill the mutual goals of individual career development and organizational enhancement. Each IDP is uniquely tailored to the needs of the individual and the organization.

IDPs work by helping an employee and supervisor 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 IDP is a written plan for the benefit of both employee and supervisor. It describes competencies that the employee will apply and enhance and how this development will occur. 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 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.

Benefits of Career Planning

Why should you be concerned about planning your career? It is your career. If you don't take responsibility for the success of your career, then who will? Besides, considering all the time and energy you spend at work, why not ensure you get maximum satisfaction from your work and career? Additionally, ODA benefits from having a competent and motivated workforce, capable of "re-tooling" itself to meet the demands placed on it by constant organizational and technological changes. The workplace has been affected by a number of significant changes and trends, which have definite ramifications for your career planning:

Sharpening the Edge

With fewer management positions and flattened organizational structures, the traditional linear career patterns will be less available. Employees will need to be more flexible, adaptable and creative in identifying their next job, and may need to consider lateral moves or rotational assignments to broaden their experience or leverage their skills.

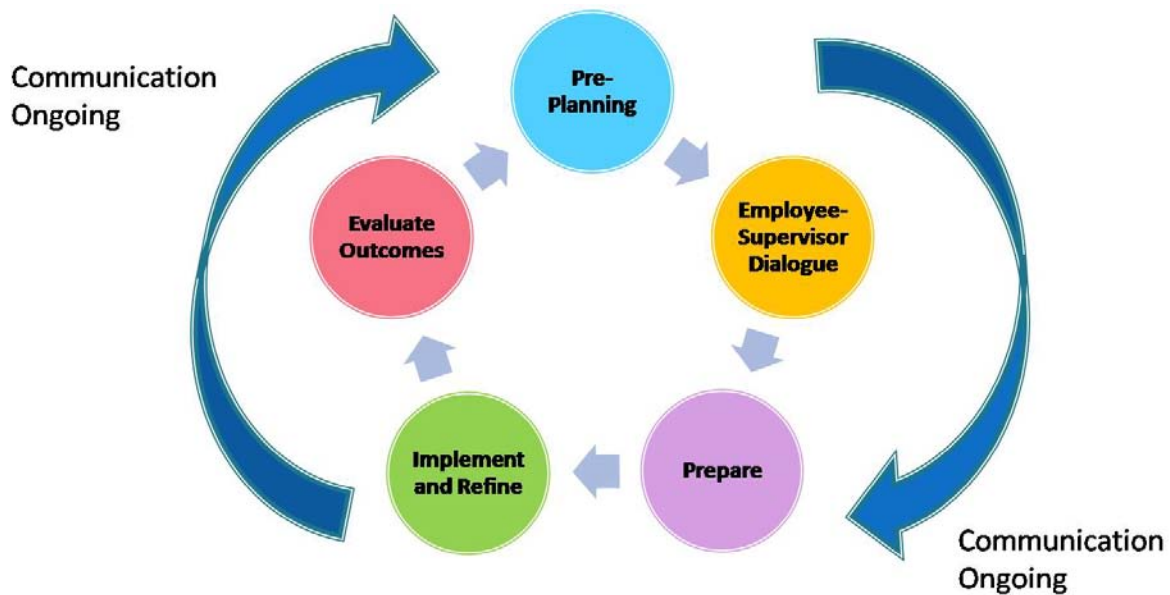
Technical knowledge and skills obsolescence

Rapid advancements in technology and state-of-the-art knowledge requires employees to upgrade their skills and "re-tool" themselves just to remain current with their job requirements. It is definitely to your advantage to position yourself for long-term employability in the rapidly changing world of

work. Begin preparing now for the future.

IDP Process

The individual development planning process is collaborative and requires ongoing communication and interaction between the supervisor and the employee. It is comprised of the following five phases:



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:

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

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

What's in an IDP

An IDP should include all of the developmental assignments, activities, and training courses indicated for the employee as a result of a:

- training needs analysis
- mandatory or core competencies, and
- career counseling
- Any activity that is intended to improve performance at the employee’s present position or a target position, and
- Desired time frame for completion of training or developmental activity
- Any activity that is intended to improve performance at the employee’s present position or a target position, and
- The desired time frame for completion of the developmental activity

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 brick laying and carpentry, or specific knowledge in a particular area of expertise, such as property management and inventory processes. Employees use many competencies in their jobs, and changing jobs requires employees to master new competencies.

Responsibilities

Employee

Each employee has the primary responsibility for working closely with their supervisor 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 supervisors or team leaders.
- Satisfactorily completing all developmental assignments and activities.

Supervisors and Managers

Supervisors or managers 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



Pre-Discussion Planning

The purpose of the pre-discussion planning phase is to prepare the supervisor and employee for their joint discussion. Both the employee and the supervisor have specific preliminary data-gathering responsibilities. This planning will not only provide time for discussion during the conference, but should also provide direction to the discussions by having this information readily available.

Where am I now?

The employee should conduct a self-assessment of current skills, strengths, and developmental areas; examine interests and values; establish your goals and priorities; and examine management priorities.

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 view 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 advance or move into a different type of job?

Enrich my present job?

Develop new skills? If so, which ones and why?

Discuss with supervisors and managers 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.

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 (current needs/standards)?

What do I strengthen for future assignments?

What are my 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.

What is my current level of job competency?

The employee and supervisor should discuss what job-related tasks are necessary for successful performance of the job. Review the employee's tasks (?). These tasks can then be used to identify the specific knowledge, skills, and abilities needed. Once identified, the employee and the supervisor can determine the areas of strength and opportunities for necessary/needed improvement.

Ask questions such as:

What are the major duties and responsibilities involved?

What special requirements are necessary or helpful to know?

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

Online 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. The Learning Resource Center has many materials that can be used to develop skills.

Tips for First-line Supervisor or Team Leader

Employees use IDPs to maintain and improve their employability and thus advance their careers. However, the supervisor uses IDPs to enhance the organization’s ability to achieve its objective, both now and in the future. Specifically, supervisors 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 supervisor’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 supervisors 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 supervisor’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.



Frequently Asked Questions

Q: Is this a performance appraisal? What effect does the IDP process have on performance appraisals?

A: This is not a performance appraisal. The IDP focuses exclusively on the employee's growth and development. Actual performance will certainly enter into the discussion, but the IDP discussion is not a performance review. Performance appraisals and IDP discussions are two separate but related conversations. Care should be taken to keep them so, especially if the two discussions are held at the same time. The performance appraisal reviews the *past* and the IDP discussion plans for the *future*.

Q: I am satisfied with my current job, and I am not interested in moving into any other position. What can an IDP do for me?

A: Because "development" does not just mean moving up or into another job, the IDP can be concerned with your growth in your current job – mastery of skills or learning different facets of the job. Employees planning to stay in their current jobs still must work at keeping skills current, remaining productive, and being successful. Very few employees are in a job that will look the same in two years. Requirements for your job may be constantly changing and it is critical to be current – if not ahead of the game.

Q: I am interested in attending a one-day seminar I just found out about. It is not in my IDP. Can I still go?

A: The IDP attempts to identify all your developmental activities, but sometimes other options become available after you prepared your IDP. So, the fact that the seminar is not identified on your IDP does not mean you cannot attend. (Should we mention adding the activity to the IDP after attending/participating?)

Q: Once something is on the IDP, can I change it?

A: Absolutely. Unexpected situations can make some planned training impossible, and things can happen that require activities that were not planned.

Q: How can I learn about training opportunities?

A: Your developmental needs should be a regular topic of discussion between you and your supervisor. Announcements of agency programs are usually circulated to

supervisors and posted on the Human Resource Development website. Work Force Development Directorate also maintains information on interagency and nongovernment training programs. Periodically you should talk with your supervisor or training officer about opportunities available to you.

Q: May the government pay for my licensing or certification examination?

A: No. Your agency may pay for training that prepares you for an examination, if the training is relevant to the agency's mission. However, the costs of examination and any related expenses are not payable under the current training law.

Q: Is it required that training be applicable only to my present job?

A: Generally, Yes. However, in some cases, you may be given training relevant to your projected future assignments or to accomplish special agency initiatives. For example, SkillSoft, our E-Learning provider, offers a wide variety of courses. However, the aim is to ensure job proficiency as well as have the employee and supervisor build a plan that outlines developmental objectives and career goals. Consequently, training and developmental activities selected will facilitate achievement of these objectives and goals. The plan enables the employee to chart a career path by identifying new knowledge, skills and abilities to pursue, as well as learning activities needed to reach the established goals.

Q: Is an IDP mandatory?

A: An IDP is mandatory for all permanent and cadre staff, including SES Candidate Development Program Participants, Presidential Management Fellows (PMF), and Student Career Experience Program Participants (SCEP). Although an IDP is not required for all employees, creating a plan is highly encouraged. For new full-time permanent and cadre employees an IDP is required 90 days after the employee reports for duty.

Q: Does my IDP have to be on the form provided?

A: You may use the format of your choice for maintaining your own personal record(s) of accomplishments, activities, goals, etc. However, you must submit the standard ODA IDP form which has been provided by the Strategic Development and Training team. The employee and supervisor should each retain a copy of the plan. An electronic copy of the IDP should be forwarded to the designated Center Human Resources Officer or IDP Coordinator for central records.

Q: How often should I review/update my IDP?

A: You should monitor your progress through your IDP on an ongoing basis. It is highly recommended that you and your supervisor review/update the form at least on a quarterly basis. This time frame is short enough to keep you focused on your short term goals, but gives you adequate time to work on some of your long term developmental activities as well. Space has been provided on the form to initial and date each quarter.

Q: How can my supervisor help with my IDP?

A: Your supervisor is one of the most important links in your development process. The supervisor can play the role of coach, advocate, or objective observer. He/she can help you explore options or directions you might not otherwise consider in pursuit of your developmental goals. Supervisors are also often an excellent source of feedback about current skills and opportunities to develop them.

Q: What are different sources to consider when developing an IDP?

A: Consider all sources: Online courses (such as SkillSoft), details, temporary assignments, book clubs, associations, and seminars are just a few of the options you can try. The ODA Strategic Training and Development team has also compiled a resource list citing relevant books, articles, and websites. The classroom is not the only place for effective learning. Be sure to consider various experiences and activities as sources of development.

Q: Who can help me?

A: Mentors, supervisors, coworkers, friends, professional organizations, ODA Strategic Training and Development team, and a host of others form a support network for your professional development.

Q: Why is feedback important?

A: Feedback is essential for:

Professional Success - To perform at the highest possible level, you must have a way of relating your efforts to your work environment. Getting feedback provides this mechanism.

Growth - Life is about growth, growth is about interaction with your environment, and interaction is about feedback. Feedback can help direct your self-improvement efforts and provide a road map for your professional development.

Keeping Your Competitive Edge - Your value to an organization (now and in the future) depends heavily on how you are perceived. Having and responding to this information raises your value to any organization.

Reality Check - Feedback helps you discover what co-workers already know - how your efforts are affecting your team's mission and success.

Balance - Good feedback helps you balance your perspective with your supervisor's and others' in a non-hostile environment. It can provide relevant and helpful information in a productive format.

Maintaining Good Work Relationships - Seeking and using honest feedback lets peers, customers, supervisors, and direct reports know you care about how your actions, decisions, and attitudes affect them. It is difficult for us to see ourselves as others see us, yet their view of us can provide valuable information for improving our skills and our effectiveness. The format of this feedback can be as informal as asking what someone thinks about your work on a project, to using a highly formalized 360-

degree assessment instrument.

Q: When should I do my first IDP?

A: IDPs will be implemented for all permanent and cadre staff, including SES Candidate Development Program Participants, Presidential Management Fellows (PMF), and Student Career Experience Program Participants (SCEP) in FY2010. For all new full-time permanent and cadre employees, an IDP is required 90 days after the employee reports for duty.

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 supervisor 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 supervisor 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 in 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.



Employee Checklist for Preparing an IDP

Identification of Personal Goals

1. Identify the assignments or job duties you would like to complete this year.
2. Define your short-range (6-12 months) 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.



Supervisor Checklist for Reviewing an IDP

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 your 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 supervisory 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. Supervisors 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.

CURRENT CAREER ISSUES WORKSHEET

What are your career issues?

How much time and effort you need to spend at any one step in the process depends on your career issues. It is important to be clear about these career issues, so that you can develop an effective strategy for dealing with them. Career issues cover a broad spectrum, ranging from getting up to speed in a new job, to making a major career field change, or planning your retirement. The following is a list of statements that reflect the full range of career issues people face at one time or another. Which ones are relevant for you now? Place an "X" in front of the statements that are true for you at this time.

You are new in your job and must learn the basics to get up to speed and feel comfortable and productive.

You have been in your job for a while and are striving for increased competence, in general.

You need to improve your performance in certain areas of your current job.

You need to update your skills or expertise to keep up with the changing technologies or state-of-the-art knowledge in your line of work.

Your job duties have changed recently (or will change), requiring some new skills or expertise on your part.

Your job may be eliminated due to re-engineering or restructuring, and you want to begin "retooling" to be ready for future opportunities.

You want to prepare for a promotion or move to the next higher level of responsibility.

You want to broaden your skills or expertise to allow yourself more flexibility for future job moves.

You want to change jobs within your current job category, and...

stay at your Organization

stay in the Federal Government

stay within Disaster Assistance

leave the Federal Government

You want to change job categories, and...

stay at your Organization

stay in the Federal Government

stay within Disaster Assistance

leave the Federal Government

____ You don't see much of a future if you remain in your current job, but aren't sure of your options.

____ You want to plan your retirement.

____ Other

KNOWLEDGE OF WORK ENVIRONMENT WORKSHEET

Answer the following questions to identify what is currently going on around you and your organization.

What changes do you expect to occur in the near future:

1. How is the mission of my organization (e.g., bureau, office or division) changing? What other changes are occurring regarding our customers, services, work processes, organizational structure, reporting relationships and personnel? Is this a change of which I want to be a part or is it time for me to consider a move?
2. What are the organization's changing needs regarding the workforce and what new expertise and skills will be required or desirable?
3. What opportunities are available for developing this new expertise and skills (work experiences, training, rotational assignments, professional conferences, mentoring, etc.)?
4. How might my role (job) change in my organization? How can I prepare for or develop new skills for these changes?
5. New expertise and skills my organization wants me to learn include...
6. What new missions or projects in my organization appeal to me? What are the organization's future needs? What kinds of development activities would help position me for participation in another work project?

KNOWLEDGE OF SELF WORKSHEET

To gain a better understanding of yourself, answer the following questions:

1. Of the new and recent developments in my organization or field, what interests me the most?
2. What are my current strengths for pursuing these interests? What do I need to do to reposition my career so that I can get involved in these new developments?
3. Is it time for me to consider working outside of my organization? If I am considering a complete career change, what experiences and learning would help reposition my career in the direction of my new interests?
4. Of all the things I have done in the last 5 years (work and non-work related), what specific activities and functions have energized me the most? What developmental activities—work experiences, learning, skill building--would help me grow in or increase these energizing functions?
5. Other things I would like to learn are...
6. What non-work related issues do I need to consider that will likely impact my career plans (e.g., health, family, financial, and social)?

INTEGRATION OF KNOWLEDGE OF SELF AND WORK ENVIRONMENT WORKSHEET

To address the match between you and your career goals and organizational needs, answer the following questions:

1. In what areas do my interests and personal plans overlap with the changing needs of my organization? Any areas of overlap represent “first choice” development targets?
2. What knowledge, skills or abilities are important for increasing or maintaining the quality of my performance in my present assignments?
3. What knowledge, skills or abilities would help prepare me for opportunities or roles I might have in the future?
4. Compared to the development needs suggested by these factors, other interests for development that are important to me include...

GOAL DEVELOPMENT WORKSHEET

A development goal is a statement of a desired outcome or accomplishment that is specific, observable and realistic. Based on the data you have generated about yourself on the previous worksheets and your specific career issues, write some career goals for the next 1, 2 and 3 years and answer the following questions. You can use the list of competencies on page 10 to assist you. Definitions for each listed competency can be found on pages 8 through 10.

1. What I want to accomplish and the competencies (knowledge/skills) I want to acquire or improve by this time next year are...
2. What I want to accomplish and the competencies (knowledge/skills) I want to acquire or improve by the end of the second year are...
3. What I want to accomplish and the competencies (knowledge/skills) I want to acquire or accomplish by the end of the third year are...
4. What barriers or obstacles might prevent me from accomplishing my goals on time (e.g., time, money, and other commitments)?
5. What can I do to overcome these barriers or obstacles? What resources are available to help me?

METHOD FOR TAKING ACTION WORKSHEET

To achieve your career developmental goals, identify the actions you plan to take by placing an "X" in front of all applicable actions. In planning your career moves, consider all of the following possibilities.

Remember that "Up" is not the only way:

_____ **Lateral Move:** Change in position within or outside an organization, but not necessarily a change in status or pay.

_____ **Job Enrichment:** Expand or change my job in order to provide growth experiences for myself.

_____ **Exploration:** Identify other jobs that require skills I have and also tap my interests and values. Job rotation is an example.

_____ **Downshifting:** Take an assignment or job at a lower level of responsibility, rank, and/or salary in order to reposition my career for something new and interesting to me, or to achieve a better balance between work and personal life.

_____ **Change Work Setting:** No significant change to my job duties, but have a different boss, organization or employer.

_____ **No Change:** Do nothing, but only after careful consideration.

There are a wide range of potential actions for me to consider in order to achieve my goals. Put an "x" next to the actions that you might consider.

- New assignments in my current job
- Rotation to a different project/job
- Seek a mentor(s)
- Volunteer for a task force or process action/re-engineering team
- Obtain on-the-job guidance from someone who is more expert in a specific area
- Attend seminars/conferences (on-site and off-site)
- Enroll in university courses
- Attend commercial/contracted courses
- Experience self-paced learning (books, videos, computer-based instruction, etc.)
- Pursue an academic degree or certification program
- Conduct informational interviews
- Move to a new job within my organization
- Move to a new job within ODA, SBA or the Federal Government
- Move to a new job outside of the Federal Government
- Plan retirement
- Other actions:

SAMPLE COMPETENCY LIST

- **Vision**
- **External Awareness**
- **Creativity and Innovation**
- **Strategic Thinking**
- **Continual Learning**
- **Resilience**
- **Flexibility**
- **Service Motivation**
- **Conflict Management**
- **Cultural Awareness**
- **Team Building**
- **Integrity / Honesty**
- **Accountability**
- **Problem Solving**
- **Decisiveness**
- **Customer Service**
- **Entrepreneurship**
- **Technical Credibility**
- **Financial Management**
- **Technology Management**
- **Oral Communication**
- **Written Communication**
- **Influencing / Negotiating**
- **Partnering**
- **Political Savvy**
- **Interpersonal Skills**

COMPETENCY LIST DEFINITIONS

Vision

Takes a long-term view and acts as a catalyst for organizational change; builds a shared vision with others. Influences others to translate vision into action.

External Awareness

Identifies and keeps up to date on key national and international policies and economic, political, and social trends that affect the organization. Understands near-term and long-range plans and determines how best to be positioned to achieve a competitive business advantage in a global economy.

Creativity and Innovation

Develop new insights into situations and applies innovative solutions to make organizational improvements; creates a work environment that encourages creative thinking and innovation; designs and implements new or cutting-edge programs/processes.

Strategic Thinking

Formulates effective strategies consistent with the business and competitive strategy of the organization in a global economy. Examines policy issues and strategic planning with a long-term perspective. Determines objectives and sets priorities; anticipates potential threats or opportunities.

Continual Learning

Grasps the essence of new information; masters new technical and business knowledge; recognizes own strengths and weaknesses; pursues self-development; seeks feedback from others and opportunities to master new knowledge.

Resilience

Deals effectively with pressure; maintains focus and intensity and remains optimistic and persistent, even under adversity. Recovers quickly from setbacks. Effectively balances personal and work life.

Flexibility

Is open to change and new information; adapts behavior and work methods in response to new information, changing conditions, or unexpected obstacles. Adjusts rapidly to new situations warranting attention and resolution.

Service Motivation

Creates and sustains an organizational culture which encourages others to provide the quality of service essential to high performance. Enables others to acquire the tools and support they need to perform well. Shows a commitment to public served and meaningful contributions to mission accomplishment.

Conflict Management

Identifies and takes steps to prevent potential situations that could result in unpleasant confrontations. Manages and resolves conflicts and disagreements in a positive and constructive manner to minimize negative impact.

Cultural Awareness

Initiates and manages cultural change within the organization to impact organizational effectiveness. Values cultural diversity and other individual differences in the workforce. Ensures that the organization builds on these differences and that employees are treated in a fair and equitable manner.

Team Building

Inspires, motivates, and guides others toward goal accomplishments. Consistently develops and sustains cooperative working relationships. Encourages and facilitates cooperation with the organization and with customer groups; fosters commitment, team spirit, pride, and trust. Develops leadership in others through coaching, mentoring, rewarding, and guiding employees.

Integrity / Honesty

Instills mutual trust and confidence; creates a culture that fosters high standards of ethics; behaves in a fair and ethical manner toward others, and demonstrates a sense of corporate responsibility and commitment to public service.

Accountability

Assures that effective controls are developed and maintained to ensure the integrity of the organization. Holds self and others accountable for rules and responsibilities. Can be relied upon to ensure that projects within areas of specific responsibility are completed in a timely manner and within budget. Monitors and evaluates plans; focuses on results and measuring attainment of outcomes.

Problem Solving

Identifies and analyzes problems; distinguishes between relevant and irrelevant information to make logical decisions; provides solutions to individual and organizational problems.

Decisiveness

Exercises good judgment by making sound and well-informed decisions; perceives the impact and implications of decisions; makes effective and timely decisions, even when data is limited or solutions produce unpleasant consequences; is proactive and achievement oriented.

Customer Service

Balancing interests of a variety of clients; readily readjusts priorities to respond to pressing and changing client demands. Anticipates and meets the needs of clients; achieves quality end-products; is committed to continuous improvement of services.

Entrepreneurship

Identifies opportunities to develop and market new products and services within or outside of the organization. Is willing to take risks; initiates actions that involve a deliberate risk to achieve a recognized benefit or advantage.

Technical Credibility

Understands and appropriately applies procedures, requirements, regulations and policies related to specialized expertise. Is able to make sound hiring and capital resource decisions and to address training and development needs. Understands linkages between administrative competencies and mission needs.

Financial Management

Demonstrates broad understanding of principles of financial management and marketing expertise necessary to ensure appropriate funding levels. Prepares, justifies, and/or administers the budget for the program area; uses cost benefit thinking to set priorities; monitors expenditures in support of programs and policies. Identifies cost-effective approaches. Manages procurement and contracting.

Human Resources Management

Assesses current and future staffing needs based on organizational goals and budget realities. Using merit principles, ensures staff are appropriately selected, developed, utilized, appraised and rewarded; takes corrective action.

Technology Management

Uses efficient and cost-effective approaches to integrate technology into the work place and improve program effectiveness. Develops strategies using new technology to enhance decision making. Understands the impact of technological changes on the organization.

Oral Communication

Makes clear and convincing oral presentations to individuals or groups; listens effectively and clarifies information as needed; facilitates an open exchange of ideas and fosters an atmosphere of open communication.

Written Communication

Expresses facts and ideas in writing in a clear, convincing and organized manner.

Influencing / Negotiating

Persuades others; builds consensus through give and take; gains cooperation from others to obtain information and accomplish goals; facilitates "win-win" situations.

Partnering

Develops networks and builds alliances, engages in cross-functional activities; collaborates across boundaries, and finds common ground with a widening range of stakeholders. Utilizes contacts to build and strengthen internal support bases.

Political Savvy

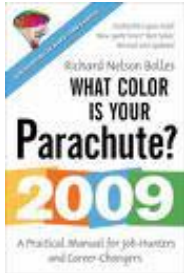
Identifies the internal and external politics that impact the work of the organization. Approaches each problem situation with a clear perception of organizational reality; recognizes the impact of alternative courses of action.

Interpersonal Skills

Considers and responds appropriately to the needs, feelings, and capabilities of different people in different situations; is tactful, compassionate and sensitive, and treats others with respect.

IDP Additional Resources

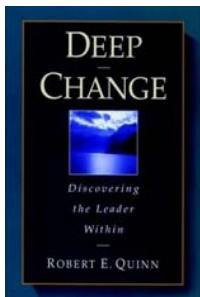
Books:



What Color is Your Parachute?

By Richard N. Bolles

Bolles offers a completely new book for this uncertain job market, laying out a simple, step-by-step plan for finding meaningful work and mission despite our economy's jobless recovery. Featuring fresh explanations of old concepts and the introduction of new ideas, Bolles defines the distinctions between "resume jobs" and "grapevine jobs," between "passive job-hunting" and "active job-hunting," between "weak ties" and "strong ties," and much more. These are not normal times. And this is not your normal PARACHUTE. It faces squarely the "workquake" that is shaking up the job market around the world, and gives not only simple steps but steady hope.



Deep Change

By Robert E. Quinn

Open this book at your own risk. It contains ideas that may lead to a profound self-awakening. An introspective journey for those in the trenches of today's modern organizations, *Deep Change* is a survival manual for finding our own internal leadership power. By helping us learn new ways of thinking and behaving, it shows how we can transform ourselves from victims to powerful agents of change. And for anyone who yearns to be an internally driven leader, to motivate the people around them, and return to a satisfying work life, *Deep Change* holds the key.



FYI: For Your Improvement, A Guide for Development and Coaching

By Michael Lombardo and Robert Eichinger

FYI is designed for any motivated person with a need and to serve as a guide for managers, mentors, coaches, and feedback givers. It is intended for all levels of an organization. FYI provides a common set of characteristics required for success and facilitates the development and deployment of resources, enterprise-wide.



Managers as Mentors: Building Partnerships for Learning

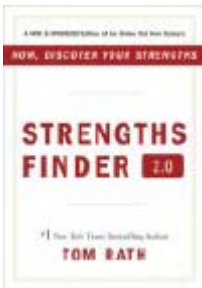
By Chip R. Bell

According to consultant and trainer Chip R. Bell, mentoring is a highly synergistic, two-way performance that, when properly engaged, takes on the synchronized qualities of a well-executed dance. In *Managers As Mentors: Building Partnerships for Learning*, he explains what mentoring is (and is not) and provides a way for readers to assess their own attributes for the practice. Subsequent information--designed to be personalized and read in any order--deals with such specifics as giving advice properly, gaining protégé acceptance, lessening the fear factor, and finding time to commit to the process.



Developmental Assignments: Creating Learning Experiences without Changing Jobs
 By Cynthia D. McCauley

This well-organized and useful guide is an update to the Center for Creative Leadership's classic book *Eighty-Eight Assignments for Development in Place*. CCL's research shows that a significant percentage of **leadership** learning occurs through varied and challenging assignments. This book provides a wealth of examples of how aspiring leaders can gain those opportunities for growth by reshaping their job, seeking temporary assignments and by taking on challenges outside of work. Addresses a real need for government agencies, where it is often difficult to give employees long-term rotational assignments.



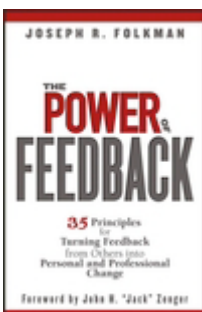
Strengthsfinder 2.0
 By Tom Rath

This book is an amazing tool for identifying your talents and learning how to develop them into true strengths. It comes with a code you can use to take an updated version of the Clifton Strengthsfinder online assessment tool that was first introduced in Gallup's best-selling book *Now, Discover Your Strengths*. This version of the Clifton Strengthsfinder provides a customized description of each of your talent themes and--more importantly--makes numerous specific suggestions for cultivating your top five talent themes.



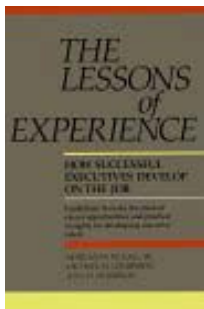
Go Put Your Strengths to Work
 By Marcus Buckingham

Go Put Your Strengths to Work takes Marcus Buckingham's work in *Now, Discover Your Strengths* to a significantly higher level. Although Buckingham is no longer with Gallup, this book nicely complements *Strengthsfinder 2.0* by developing key issues such as how to reshape your job so that you can spend more of your time engaged in activities that play to your strengths. In lieu of providing an online assessment tool to identify your strengths, Buckingham provides an excellent methodology for identifying your specific strengths through a well-defined process of self-reflection. If you are willing to put in the work, the results are likely to be even more useful than those from *Strengthsfinder 2.0*. Includes some useful online tools and videos as well.



The Power of Feedback: 35 Principles for Turning Feedback from Others into Personal and Professional Change
 By Joseph R. Folkman

Excellent follow-up to Folkman's book *The Extraordinary Leader* (which he co-authored with Jack Zenger). In this book, Folkman talks about some of the pitfalls inherent in not acting on feedback and explores some of the reasons we often don't act on the feedback we receive. He also suggests ways to improve our ability to accept feedback and actually change our behaviors. Highly recommended for anyone who cares about how they are perceived by others.

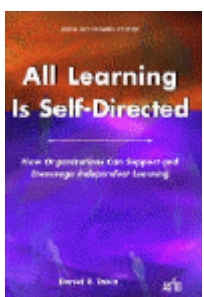


The Lessons of Experience: How Successful Executives Develop on the Job

By Morgan W. McCall, Jr., Michael M. Lombardo, and Ann N. Morrison

This is one of the most useful books on executive development ever published. It clearly outlines the various types of experiences that drive the vast majority of all leadership learning. Provides superb perspective on how to approach development most effectively. (Hint: Classroom training is responsible for only a minor portion of leadership learning.) Besides being full of wisdom, this book is a great read. For a taste of the quality of the material in this book, check out the Center for Creative Leadership's report [Twenty-Two Ways to Develop Leadership in Staff Managers](#), which was co-authored by Michael

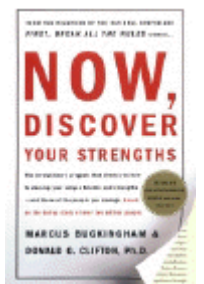
Lombardo.



All Learning is Self-Directed: How Organizations Can Support and Encourage Independent Learning

By Daniel R. Tobin

This book is an absolute gold mine of information for managers who want to develop the skills and knowledge of their people. It describes all the different kinds of self-directed learning and provides a comprehensive strategy for implementing them. One of the best sections includes a description of what managers can do to foster a positive learning environment for their employees.



Now, Discover Your Strengths

By Marcus Buckingham and Donald O. Clifton

This book is the first sequel to *First, Break All the Rules*, and builds on the compelling case that the Gallup Organization's research makes for building on strengths instead of "fixing" relative weaknesses. Identifies 34 different talent "themes" and how to turn them into actual on-the-job strengths. Includes tips for managers on how to cultivate employees who have each kind of talent. The book also comes with an excellent online self-assessment that helps readers identify their talent themes.

Articles:

Using IDPs to Leverage Strengths

<http://govleaders.org/idp.htm>

Take Responsibility for Your Own Learning

<http://www.tobincls.com/responsibility.htm>

Websites:

Occupational Outlook Handbook

<http://www/bls.gov/oco>

SBA Personnel Office

<http://yes.sba.gov/personnel/hr>

Strategically Planning Training and Measuring Results

http://www.opm.gov/hcaaf_resource_center/assets/Lead_tool7.pdf

Individual Development Planning

http://www.opm.gov/hcaaf_resource_center/assets/Lead_tool3.pdf

Individual Learning Strategies – Self-Development

<http://www.humtech.com/opm/grtl/ILS/ils8.cfm>

Individual Learning Strategies – Individual Development Plan

<http://www.humtech.com/opm/grtl/ILS/ils5.cfm>

USDA Farm Service Agency

<http://www.fsa.usda.gov/FSA/hrdapp?area=home&subject=tra&topic=idp>

US Fish & Wildlife Service Guided Tour

<http://training.fws.gov/led/idp/index.html>

Some courses that may interest you...

[Strategic Human Resource Development](#)

[Goal Setting - Reaching Individual Goals](#)

[Knowledge as Strategy: Performance Improvement](#)

[The Power of the Learning Organization](#)

[Problem Performance Improvement](#)

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