



**TRICARE**  
Management Activity

# *Individual Development Plan*

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## **INTRODUCTION:**

Agencies must create a culture that encourages, supports, and invests in the short- and long-term development of their employees. Employees' professional development should be an ongoing process to ensure employees are staying current—if not one step ahead—in their fields and mission-critical competencies. Planning for continuous development must be anchored to the agency's mission, goals, objectives, and needs, as well as be tied to the employee's work and career goals. The IDP is developed by the employee and their supervisor/manager. As the Plan is built, the employee and supervisor/manager will outline developmental objectives and career goals. The employee and supervisor/manager will also select training activities for achieving these objectives and goals.

## **WHEN TO PREPARE AN IDP:**

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

- The performance appraisal
- The training needs analysis
- Career development planning, and The IDP

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

## **WHAT IS AN IDP:**

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

- Training needs analysis
- Mandatory or core competencies, and
- Career counseling

It should:

- Be any activity that is intended to improve performance at the employee's present position or a target position, and
- Include desired time frame for completion of training.

## **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 skills needed to perform the job. Competencies could also 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.

## **EMPLOYEE CHECKLIST FOR PREPARING AN IDP:**

### **Identification of Personal Goals**

- ✓ Identify the assignments or job duties you would like to complete this year.
- ✓ Define your short-range (1 year) goals.
- ✓ List future activities that you would like to accomplish.
- ✓ List possible career paths open to you (e.g., Staffing specialist, HR specialist)
- ✓ Define your long-range (1-3 years) goals.
- ✓ 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**

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

### **Identification of Objectives**

- ✓ Read your job description and job objectives.
- ✓ Read your most recent performance appraisal.
- ✓ Read your office/division mission and function statement.
- ✓ Identify elements of your job where you excel.
- ✓ List those elements of your job where you believe performance could be improved.

## **SUPERVISOR CHECKLIST FOR REVIEWING IDPS:**

### **Reviewing the IDP:**

- ✓ Are the employee's goals realistic based on your assessment of the employee's capabilities and past performance?
- ✓ Are the employee's goals consistent with our office/division needs, core competencies, and organization goals?
- ✓ Do the proposed development activities support the employee's goals?
- ✓ 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?
- ✓ Do the developmental activities address performance improvement areas noted in the most recent performance appraisal?

## **PURPOSE AND BENEFITS OF INDIVIDUAL DEVELOPMENT PLANNING:**

The purpose of an IDP is twofold. First, it ensures that the employee maintains the current level of job proficiency through continued training and developmental activities. Supervisors develop a better understanding of their employees' professional goals, strengths, and development needs—which can result in more realistic staff and development planning. 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. . IDP helps identify the employee's career development goals and the strategies for achieving them. Employees take personal responsibility and accountability for their career development, acquiring or enhancing the skills they need to stay current in required skills. Third, the IDP will support organization mission and career field need, and assist in planning for the agency's training and development requirements. IDP benefits the organization by aligning employee training and development efforts with the mission, goals, and objectives of the agency.

## **ROLES AND RESPONSIBILITIES:**

Supervisors and employees work together to complete the employee's development plan, but employees are ultimately responsible for taking the initiative for their professional development.

### **Employees should:**

- Assess their level of competence vis-à-vis the competencies, skills, and knowledge required in their jobs
- Identify their professional career goals and development needs and various training and development opportunities that will help them achieve those goals and meet those needs
- Periodically assess their progress toward reaching their goals.

### **Supervisors should:**

- Realistically assess employees' strengths and development needs vis-à-vis organizational requirements
- Provide regular (e.g., annual) opportunities to discuss and plan for employees' development

- Ensure the alignment of employees' career goals and development needs to work unit goals/objectives
- Help employees identify appropriate training and development opportunities

### **INDIVIDUAL DEVELOPMENT PLANNING PROCESS:**

The individual development planning process requires communication and interaction between the supervisor and the employee. It involves five phases:

- **Pre-Planning** – Supervisor and employee prepare independently for meeting
- **Employee/Supervisor Meeting** – Discuss employee strengths, areas for improvement, interests, goals, and organizational requirements
- **Prepare Individual Development Plan** – Employee, in consultation with supervisor, completes plan for individual development
- **Implement Plan** – Employee pursues training and development identified in plan
- **Evaluate Outcomes** – Supervisor/employee evaluate usefulness of training and development experiences

### **KEY ELEMENTS OF IDPS:**

Within the Federal Government, there are no regulatory requirements mandating employees complete Individual Development Plans (IDPs). However, it is considered a good management practice, and many agencies have developed their own IDP planning process and forms. An effective plan should include the following key elements:

**Employee profile** – name, position title, office, grade/pay band

**Career goals** – short-term and long-term goals with estimated and actual completion dates

**Development objectives** – linked to work unit mission/ goals/objectives and employee's development needs and objectives

**Training and development opportunities** – specific formal classroom training, workshops, rotational assignments, shadowing assignments, on-the-job training, self-study programs, professional conferences/seminars, etc., that employee will pursue with estimated and actual completion dates

**Signatures** – including supervisory and employee signatures and date.

## **DEFINITIONS:**

**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.

**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.

**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.

**Competency Profile.** A list of knowledge, skills, and abilities that can be linked to specific job tasks.

**Distance Learning.** Any approach to education delivery that replaces same-time, same-place face-to-face environment of the traditional classroom.

**Distributed Learning.** A type of distance learning that is technology enabled, learning-team focused, facilitated by a content expert, and delivered anytime and anywhere.

**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.

**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.

**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.

**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.



## APPENDIX A: INDIVIDUAL DEVELOPMENT PLAN



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**PRIVACY ACT STATEMENT:** Section 4103 of Title 5 of U. S. Code authorizes collection of this information. This information will be used by supervisors to plan and/or schedule training, education or other career development activities relevant to the position. This will be a functional tool for both the supervisor and employee, to the status of the employee's progress or lack thereof.

<b>NAME</b>	<b>POSITION TITLE</b>	<b>PAY PLAN, SERIES and GRADE</b>	
<b>INITIAL DATE</b>	<b>PERIOD COVERED</b>	<b>LAST UPDATED</b>	
<b>DEVELOPMENT OBJECTIVES/GOALS</b>			
<b>SHORT TERM OBJECTIVES</b>		<b>LONG TERM OBJECTIVES</b>	
<b>METHODS OF ACCOMPLISHING OBJECTIVES/GOALS</b>			
<b>DEVELOPMENT ASSIGNMENTS</b>	<b>FORMAL TRAINING</b>	<b>OTHER ACTIVITIES</b>	<b>DATE COMPLETED</b>
<b>SUGGESTED TRAINING:</b>			
<b>STUDENT SIGNATURE, DATE</b>		<b>SUPERVISOR'S SIGNATURE, DATE</b>	