



LET'S WORK ON YOUR IDP VIRTUALLY

**Participant Guide  
V2**

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## Why Am I Here?

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- ▶ **Describe DOE IDP requirements**
- ▶ **Explain the IDP process**
- ▶ **Explain IDP roles & responsibilities**
- ▶ **Identify the benefits of having an IDP**
- ▶ **Describe high-quality IDPs**



▶ 3

What do I expect from this session?

**Notes:**

## What Does DOE Require?

Fill in the blanks.

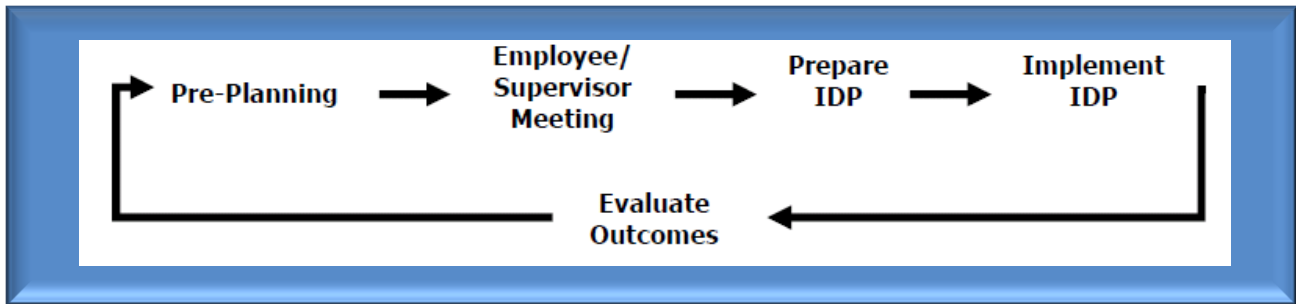
### *Federal Employee Training, DOE O 360.1C*



- ▶ **All DOE employees \_\_\_\_\_ have individual development plans (IDPs) in place within \_\_\_\_\_ of joining DOE, being reassigned, or beginning a new performance cycle.**
- ▶ **All training records, including \_\_\_\_\_, continued service agreements and correspondence, \_\_\_\_\_ be initiated, approved, and recorded in DOE's CHRIS or Employee Self Service (\_\_\_\_\_) systems.**

Notes:

## What's the IDP Planning Process?



### Pre-Planning

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### Employee/Supervisor Meeting

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### Prepare IDP

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### Implement IDP

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### Evaluate Outcomes

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For Pre-planning—Take a look at Appendix A for a tool to help employees with pre-planning the IDP.

For Preparing Individual Development Plan, see Appendix B which provides a job aid to assist you in preparing your IDP in the Employee Self-Service system.

## Who is Responsible for IDPs?

- Check the box beside the responsibilities that you already do.
- If you're a supervisor, you will need to check off responsibilities for employees and supervisors because you have a dual role.

### Who's Responsible?

#### Employee

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



▶ 0 <http://www.opm.gov/policy-data-oversight/human-capital-management/reference-materials/leadership-knowledge-management/developmentplanning.pdf>

### Who's Responsible?

#### Supervisor

- 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
- Evaluate outcomes of employees' training and development efforts



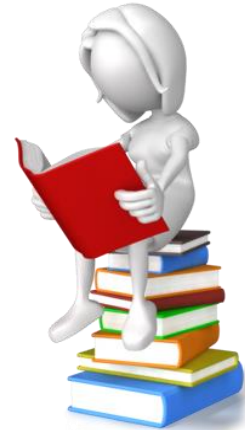
▶ 1 <http://www.opm.gov/policy-data-oversight/human-capital-management/reference-materials/leadership-knowledge-management/developmentplanning.pdf>

## How Do I Benefit from Having an IDP?

Check two benefits that are most beneficial to you. Put the number of the benefits you feel are most beneficial in the chat box in Adobe Connect.

### IDP Benefits

1. Focus my investment on enhancing my strengths and developing my areas for improvement
2. Allows time for self-reflection
3. Document your plan for development
4. Guide discussions with your supervisor regarding your development
5. Align your goals, strengths, and areas for improvement with your developmental activities
6. Allows you to make better decisions about your development
7. Measure your success



## How Do I Know if I Have a High-quality IDP?

A high-quality IDP is/has...

- An individually tailored action plan that outlines developmental objectives with appropriate activities to achieve success
- Challenging and connected to your goals
- Various developmental activities, not just training
- Focuses contains information regarding developmental needs and associated resources
- Aligned to the organization's mission and goals
- Realistic, but aggressive
- It's relevant to the organization's needs
- Driven by you



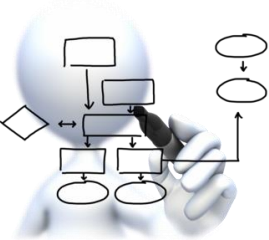




See Appendix C for the *Is It a High-Quality IDP? Checklist*. The checklist is a tool to help you assess the quality of your IDP.



## How Do I Use the Checklist?

Locate you're the *DOE Employee's IDP* handout. Use the, *Is It a High-Quality IDP? Checklist*, shown below, to assess the quality of the DOE employee's IDP. Type your rationale in the chat pod in Adobe Connect to share and discuss your assessment with the group.

<p><b>Robustness</b></p> 	<ul style="list-style-type: none"> <li><input type="checkbox"/> Is it current (created within the last 12 months)?</li> <li><input type="checkbox"/> Does the IDP have a planned date to reflect on progress?</li> <li><input type="checkbox"/> To what extent is there connectivity between short and long-term goals, development needs, and planned development activities?</li> <li><input type="checkbox"/> Are challenging assignments and projects represented?</li> </ul>	
<p><b>Variety</b></p> 	<ul style="list-style-type: none"> <li><input type="checkbox"/> Are multiple types of formal and informal learning approaches integrated into the planned activities?</li> <li><input type="checkbox"/> Does it appeal to my learning preferences?</li> <li><input type="checkbox"/> Does the plan offer an opportunity to enhance strengths, as well as address deficiencies?</li> <li><input type="checkbox"/> Does it have relationship, experiential, and instructional activities?</li> </ul>	
<p><b>Structure</b></p> 	<ul style="list-style-type: none"> <li><input type="checkbox"/> Does the plan include specific development needs (e.g. technical competencies &amp; skills, fundamental competencies &amp; skills)?</li> <li><input type="checkbox"/> Are there concrete planned actions directly aligned to each identified current &amp; future development needs?</li> <li><input type="checkbox"/> Does the plan have identified monetary resources needed to complete developmental activities?</li> </ul>	
<p><b>Alignment</b></p> 	<ul style="list-style-type: none"> <li><input type="checkbox"/> Do development needs and planned actions support current &amp; future business objectives?</li> </ul>	
<p><b>Actionable</b></p> 	<ul style="list-style-type: none"> <li><input type="checkbox"/> Has a specific timeframe within which the development will be initiated and/or completed been identified?</li> <li><input type="checkbox"/> Are timeframes aggressive, but realistic for accomplishing developmental activities?</li> </ul>	

**What Will I Do?**



**Start**

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**Stop**

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**Continue**

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### What happens next?

- ▶ Complete the CHRIS evaluation to receive credit for attending this webinar
- ▶ Attend another Continual Learning Program Workshop
  - *Keep Learning Even with Tight Budgets*
  - *Employee Development for Supervisors*
  - *How to Create IDPs in ESS*
- ▶ In one to three months, you will receive an email to complete a Level 3 course evaluation to assess the transfer of this training to your job



### Who do I contact if I have additional questions?

Deadra Welcome, Knowledge Capture & Transfer, Program Manager  
HC-20, (202) 586-9533  
deadra.welcome@hq.doe.gov

Norman Houghtaling, Continual Learning Program Co-Lead  
HC-202 (202) 586-0953  
norman.houghtaling@hq.doe.gov

Ken Hogan Continual Learning Program Co-Lead  
HC-20, (301) 903-9846  
kenneth.hogan@hq.doe.gov





# Roadmap to Success

## Self-Development Plan

<b>Name:</b>	<b>Position:</b> <b>Organization Code:</b>
<b>Date Developed:</b>	<b>Date Approved:</b>

### Part 1 – Where am I now?

#### Greatest Strengths

Competency	Specific Behavior(s)

#### Opportunities for Development

Competency	Specific Behavior(s)

**Part 2 – Where do I want to be?**

**Short-term professional development goals (1-2 years)**

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**Long-term professional development goals (3-5 years)**

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# Part 3 – How will I get there?

Personal Action Plan				
<b>Competency to Develop/Enhance:</b>  <b>Specific Behavior(s):</b>				
<b>Desired Change:</b> <i>(Exactly what do I want to improve?)</i>		<b>Benefits:</b> <i>(How will improving in this area benefit me and my organization?)</i>		
<b>Developmental Activity &amp; Timeframe</b> <i>(What developmental activities will support achieving desired change? When will I complete each activity?)</i>	<b>Potential Barriers</b> <i>(What factors might impede accomplishing the preceding activities?)</i>	<b>Involvement of Others</b> <i>(Which people will assist or work with me on each activity and what do I want them to do?)</i>	<b>Measuring Progress</b> <i>(How will I measure my progress?)</i>	<b>Estimated Cost</b> <i>(How much will this cost?)</i>

**Personal Action Plan**

**Competency to Develop/Enhance:**

**Specific Behavior(s):**

**Desired Change:** *(Exactly what do I want to improve?)*

**Benefits:** *(How will improving in this area benefit me and my organization?)*

<p><b>Developmental Activity &amp; Timeframe</b> <i>(What developmental activities will support achieving desired change? When will I complete each activity?)</i></p>	<p><b>Potential Barriers</b> <i>(What factors might impede accomplishing the preceding activities?)</i></p>	<p><b>Involvement of Others</b> <i>(Which people will assist or work with me on each activity and what do I want them to do?)</i></p>	<p><b>Measuring Progress</b> <i>(How will I measure my progress?)</i></p>	<p><b>Estimated Cost</b> <i>(How much will this cost?)</i></p>



**Personal Action Plan**

**Competency to Develop/Enhance:**

**Specific Behavior(s):**

**Desired Change:** *(Exactly what do I want to improve?)*

**Benefits:** *(How will improving in this area benefit me and my organization?)*

<b>Developmental Activity &amp; Timeframe</b> <i>(What developmental activities will support achieving desired change? When will I complete each activity?)</i>	<b>Potential Barriers</b> <i>(What factors might impede accomplishing the preceding activities?)</i>	<b>Involvement of Others</b> <i>(Which people will assist or work with me on each activity and what do I want them to do?)</i>	<b>Measuring Progress</b> <i>(How will I measure my progress?)</i>	<b>Estimated Cost</b> <i>(How much will this cost?)</i>

Personal Action Plan				
<p><b>Competency to Develop/Enhance:</b></p> <p><b>Specific Behavior(s):</b></p>				
<p><b>Desired Change:</b> <i>(Exactly what do I want to improve?)</i></p>		<p><b>Benefits:</b> <i>(How will improving in this area benefit me and my organization?)</i></p>		
<b>Developmental Activity &amp; Timeframe</b> <i>(What developmental activities will support achieving desired change? When will I complete each activity?)</i>	<b>Potential Barriers</b> <i>(What factors might impede accomplishing the preceding activities?)</i>	<b>Involvement of Others</b> <i>(Which people will assist or work with me on each activity and what do I want them to do?)</i>	<b>Measuring Progress</b> <i>(How will I measure my progress?)</i>	<b>Estimated Cost</b> <i>(How much will this cost?)</i>

Personal Action Plan				
<p><b>Competency to Develop/Enhance:</b></p> <p><b>Specific Behavior(s):</b></p>				
<p><b>Desired Change:</b> <i>(Exactly what do I want to improve?)</i></p>		<p><b>Benefits:</b> <i>(How will improving in this area benefit me and my organization?)</i></p>		
<b>Developmental Activity &amp; Timeframe</b> <i>(What developmental activities will support achieving desired change? When will I complete each activity?)</i>	<b>Potential Barriers</b> <i>(What factors might impede accomplishing the preceding activities?)</i>	<b>Involvement of Others</b> <i>(Which people will assist or work with me on each activity and what do I want them to do?)</i>	<b>Measuring Progress</b> <i>(How will I measure my progress?)</i>	<b>Estimated Cost</b> <i>(How much will this cost?)</i>

## Part 4 – How will I know I am moving?

Part 4 – How will I know I am moving?				
Developmental Activity & Date Completed	Actual Cost	Actual Outcome	How am I applying the learning?	Lessons Learned

Appendix A

<b>Developmental Activity &amp; Date Completed</b>	<b>Actual Cost</b>	<b>Actual Outcome</b>	<b>How am I applying the learning?</b>	<b>Lessons Learned</b>

## Development Commitment

This section is to certify that each designee will support the development activities outlined in this plan and agree to the Roles & Responsibilities outlined below and discussed.

***As a DOE Professional, I agree to:***

- Assess my knowledge and skills periodically.
- Share the results of the assessment with my immediate supervisor.
- Develop a Self-Development Plan that addresses current positions as well as for advancement to future positions.
- Take full advantage of the developmental opportunities afforded to me.
- Complete and return all evaluation of training forms at the conclusion of all completed training.
- Share program experiences, knowledge, and lessons learned by networking with other Professionals.
- Create and execute action plans for applying learning on the job.
- Review and practice skills learned as often as possible.

\_\_\_\_\_  
***Signature***

\_\_\_\_\_  
***Date of Commitment***

***As your immediate supervisor, I agree to:***

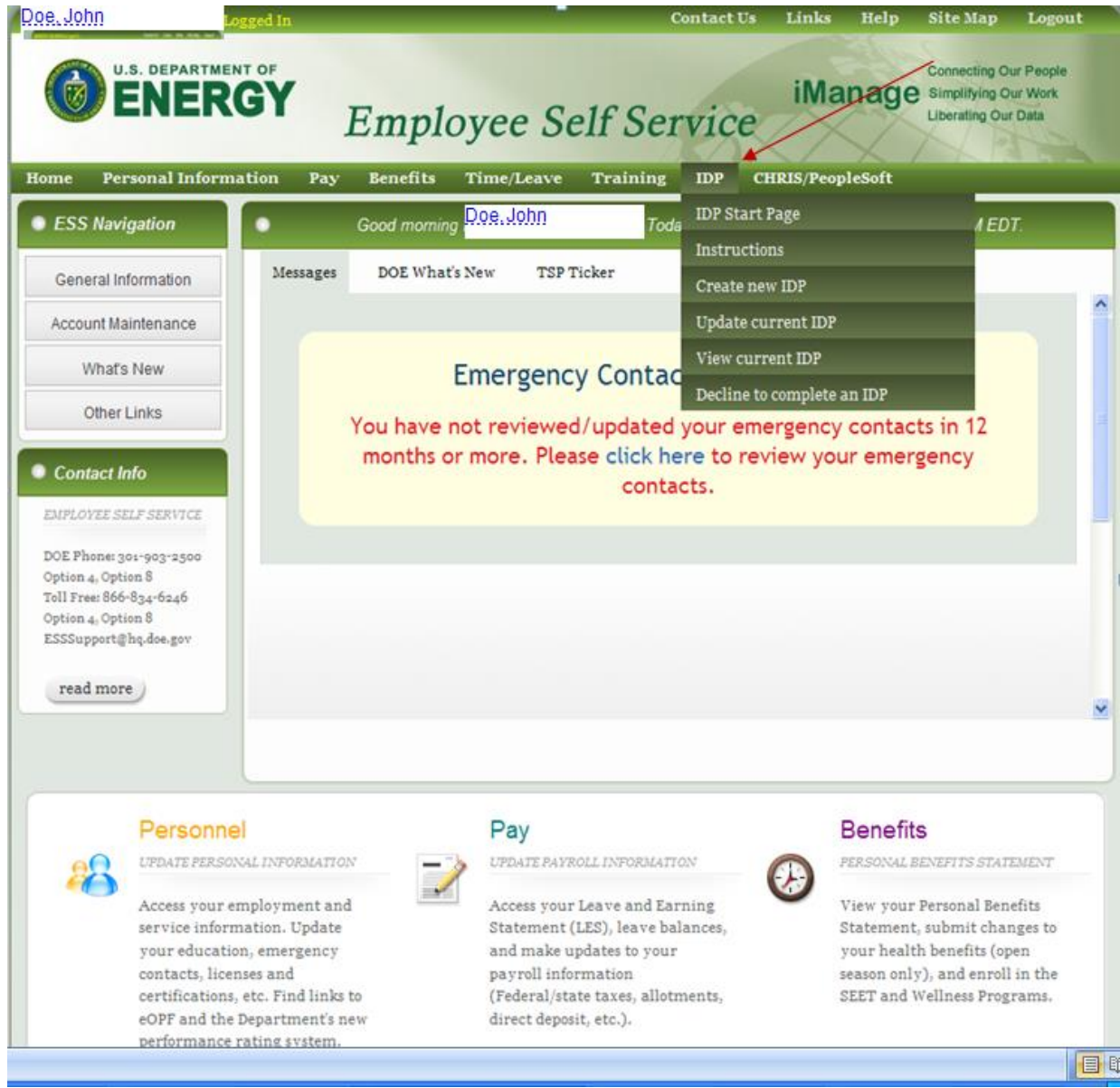
- Participate in the identification of your developmental needs and appropriate training and/or developmental experiences.
- Serve as final approving authority for your Self-Development Plan to ensure you meet the established guidelines.
- Assist in the process of identifying your developmental activities for current and future positions, taking into account your workload and performance requirements of your work unit.
- Schedule regular meetings, in addition to the quarterly check-in meetings, with you to discuss your development.
- Maintain ongoing coaching, focusing on your current job by providing guidance and challenging work assignments to enhance developmental opportunities.
- Make workload adjustments to allow you to fully participate in all developmental activities.
- Use you in challenging and new developmental experiences.

\_\_\_\_\_  
***Immediate Supervisor Signature***

\_\_\_\_\_  
***Date of Commitment***

**INDIVIDUAL DEVELOPMENT PLAN JOB AID**

Log into to ESS>Click the IDP drop down menu>Click Start Page



## Appendix B

Click on “Create a new IDP”

NOTE: This screen also gives you the option to change supervisors, view, update and rollover your IDP.

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**ENERGY**  
Employee Self Service  
iManage  
Connecting Our People  
Simplifying Our Work  
Liberating Our Data

Home Personal Information Pay Benefits Time/Leave Training IDP CHRIS/PeopleSoft

Individual Development Plan for [Doe.John](#)

Your organization's current evaluation cycle dates = 10/01/12 - 09/30/13

<u>Period Covered</u>	<u>Effective Date</u>	<u>Status</u>	<u>Supervisor</u>	
10/01/12 - 09/30/13	05/19/11 01:43:11 PM	Signed	<a href="#">Super..Joe</a>	<a href="#">Change supervisor</a>
3H00000000 - OFFICE OF THE CHIEF HUMAN CAPITAL OFFICER				<a href="#">View   Update   Rollover</a>

[Create a new IDP](#)

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Your initial IDP will be (blank) in the goal column for your 3 Short Range and Long Range goals, so click on the word/link (Modify) to enter goals.

**Individual Development Plan for HODNE1Doe, John**  
 10/01/2012 to 09/30/2013

*This IDP has already been signed by your supervisor.  
 If you choose to make a change, your IDP will need to be signed again by your Supervisor.*

**Goal Summary**

Click on **[Modify]** link to establish a summary of each goal.  
 Click on **[Delete]** link to delete a goal title.  
 Click on **[Add Activities]** link to add activities to the goal established.  
 You may also Click on a goal title to add activities to that goal.

<b>Short Range Goal 1:</b>	Learn tricks and tips of MS Of ...	[Modify]	[Delete]	[Add Activities]
<b>Short Range Goal 2:</b>	Expand Teamwork and Communicat ...	[Modify]	[Delete]	[Add Activities]
<b>Short Range Goal 3:</b>	Develop Project & Program Mana ...	[Modify]	[Delete]	[Add Activities]
<b>Long Range Goal 1:</b>	Attend ISD training course ...	[Modify]	[Delete]	[Add Activities]
<b>Long Range Goal 2:</b>	Attend class for curriculum de ...	[Modify]	[Delete]	[Add Activities]
<b>Long Range Goal 3:</b>	(blank)	[Modify]		

Request Supervisor Review   Set Target Yr   Set Pref Order   View IDP

Back to IDP Start page

Enter your Goal in the box below>Click Save

[Doe, John](#) Logged In [Contact Us](#) [Links](#) [Help](#) [Site Map](#) [Logout](#)

U.S. DEPARTMENT OF **ENERGY** *Employee Self Service* **iManage** Connecting Our People  
Simplifying Our Work  
Liberating Our Data

[Home](#) [Personal Information](#) [Pay](#) [Benefits](#) [Time/Leave](#) [Training](#) [IDP](#) [CHRIS/PeopleSoft](#)

Individual Development Plan for [Doe, John](#) from  
10/01/2012 to 09/30/2013

**Long Range Goal 3:**  
\*- required field entry  
\*Goal Description:

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This window will appear>Click on one of the Activity boxes below to enter an activity. You can add more than one activity per goal.



## Appendix B

This window will appear so you can enter the detailed information for your activities. You can select one of the 3 save options on the bottom.

The screenshot displays the 'Employee Self Service' interface for the U.S. Department of Energy. The user 'Doe, John' is logged in. The page title is 'Individual Development Plan for Doe, John from 10/01/2012 to 09/30/2013'. The current goal is 'Long Range Goal 3: Manage a Training Program'. The user is prompted to 'Enter an activity that does not appear in a DOE catalog' and is required to enter a field.

* Activity Type:	Self-Study
* Course Name:	Self-Study
* Reason:	Development
* Describe Activity (If a course, you must include course number/title, vendor contact information):	Read training manager handbooks, continuity guides and job aids.
Start Date:	06/13/2013 (Enter as mm/dd/yyyy or leave blank for TBD)
End Date:	07/31/2013 (Enter as mm/dd/yyyy or leave blank for TBD)
Vendor:	
Duty Hours:	0
Non-Duty Hours:	0
Est. Cost:	\$ 0
Activity Location (city, state):	
Est. Travel:	\$ 0
Date Completed:	(Enter as mm/dd/yyyy or leave blank for TBD)

Save/Set Target dates    Save/Back to Goal Summary

Save/Back to Activity Summary for this goal

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## Appendix B

To View your IDP>Click on View current IDP (example is below this screen shot).

The screenshot displays the U.S. Department of Energy Employee Self Service (iManage) interface. At the top, the user 'Doe John' is logged in. The navigation bar includes 'Home', 'Personal Information', 'Pay', 'Benefits', 'Time/Leave', 'Training', 'IDP', and 'CHRIS/PeopleSoft'. A dropdown menu is open under the 'IDP' tab, listing options: 'IDP Start Page', 'Instructions', 'Create new IDP', 'Update current IDP', 'View current IDP', and 'Decline to complete an IDP'. A red arrow points to the 'View current IDP' option. A yellow warning box in the center of the page reads: 'Emergency Contact: You have not reviewed/updated your emergency contacts in 12 months or more. Please click here to review your emergency contacts.' The page also features sections for 'Personnel' (Update Personal Information), 'Pay' (Update Payroll Information), and 'Benefits' (Personal Benefits Statement).

**SAMPLE IDP (one goal and one activity)**

**Individual Development Plan for Doe, John from  
10/01/2012 to 09/30/2013**

<b>Name:</b> Doe, John	<b>Title/Position:</b> HUMAN RESOURCES SPECIALIST (HUMAN RESOURCE DEVELOPMENT)		
<b>Organizational Unit:</b> DOE ORG	<b>Grade/Step:</b> 12/02	<b>Work Phone:</b> 999-999-9999	<b>Employee ID:</b> XXXXX
This IDP is in progress, started on 05/19/2011			

Reason	Activity	Description	Training Cost	Travel Cost	Total Cost	Hours	Start Date / Target Date
<b>Long Range Goal 3: Manage a Training Program</b>							
Development	Other	<b>Course name:</b> OJT <b>Description:</b> Will receive training from the training managers assigned to various organizations	0	0	0	0	06/13/2013  TBD

[Request Supervisor Review](#)

[Back to Goal Summary](#)

**NOTE: If IDP is "In Progress", click "Request Supervisor Review". Your supervisor will receive an email prompting them to review/approve your IDP.**

## Appendix B

To Decline completing an IDP>Click on “Decline to Complete an IDP” and follow the instructions. You will need to have a justification and your supervisor needs to approve it.



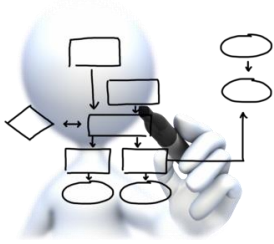


The screenshot displays the U.S. Department of Energy Employee Self Service (iManage) interface. At the top, the user 'Doe John' is logged in. The navigation bar includes 'Home', 'Personal Information', 'Pay', 'Benefits', 'Time/Leave', 'Training', 'IDP', and 'CHRIS/PeopleSoft'. A dropdown menu is open under the 'IDP' tab, listing options: 'IDP Start Page', 'Instructions', 'Create new IDP', 'Update current IDP', 'View current IDP', and 'Decline to complete an IDP'. A red arrow points to the 'Decline to complete an IDP' option. A yellow warning box in the center reads: 'Emergency Contact: You have not reviewed/updated your emergency contacts in 12 months or more. Please click here to review your emergency contacts.' The bottom of the page features three main sections: 'Personnel' (Update Personal Information), 'Pay' (Update Payroll Information), and 'Benefits' (Personal Benefits Statement).

**If you have any questions concerning IDPs, contact your Training POC.**





## Is It a High-Quality IDP?

Checklist for:		Comments
<p><b>Robustness</b></p> 	<input type="checkbox"/> Is it current (created within the last 12 months)? <input type="checkbox"/> Does the IDP have a planned date to reflect on progress? <input type="checkbox"/> To what extent is there connectivity between short and long-term goals, development needs, and planned development activities? <input type="checkbox"/> Are challenging assignments and projects represented?	
<p><b>Variety</b></p> 	<input type="checkbox"/> Are multiple types of formal and informal learning approaches integrated into the planned activities? <input type="checkbox"/> Does it appeal to my learning preferences? <input type="checkbox"/> Does the plan offer an opportunity to enhance strengths, as well as address deficiencies? <input type="checkbox"/> Does it have relationship, experiential, and instructional activities?	
<p><b>Structure</b></p> 	<input type="checkbox"/> Does the plan include specific development needs (e.g. technical competencies & skills, fundamental competencies & skills)? <input type="checkbox"/> Are there concrete planned actions directly aligned to each identified current & future development needs? <input type="checkbox"/> Does the plan have identified monetary resources needed to complete developmental activities?	
<p><b>Alignment</b></p> 	<input type="checkbox"/> Do development needs and planned actions support current & future business objectives?	
<p><b>Actionable</b></p> 	<input type="checkbox"/> Has a specific timeframe within which the development will be initiated and/or completed been identified? <input type="checkbox"/> Are timeframes aggressive, but realistic for accomplishing developmental activities?	