



Office of Disaster Assistance (ODA) U.S. Small Business Administration  
**INDIVIDUAL DEVELOPMENT PLAN (IDP)**

**Instructions for use:**

- Beginning in FY2010, this IDP form is **REQUIRED** for the following ODA employees: Permanent full-time, cadre full-time, 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.
- This document is a plan only and **NOT** a contract.
- It is the documentation of your individual development plan, which of course is a much broader process (please see the IDP Quick Guide; **attached**).
- This document should be understood as a record-keeping tool. It is not meant to be a substitute for the self-assessment exercises you should have already completed (please see the ODA IDP Guide Book pages 19-25).
- Specific programs and training that require funding are subject to the availability of funds and the required approval process.
- The form should be modified throughout the year as appropriate and updated annually at a minimum.
- Supervisor and employee should meet regularly to discuss progress.
- If you need assistance completing this form please refer to the ODA IDP Quick Guide, the ODA IDP Guidebook, your supervisor, your Center Human Resource Office (CHRO), and/or the training office.
- Once this document is completed to the satisfaction of the employee and the supervisor, it should be submitted to your CHRO or your IDP liaison for record-keeping.



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**INDIVIDUAL DEVELOPMENT PLAN (IDP)**

<b>(1) Employee's Name</b> (Last Name, First Name)		<b>(2) Supervisor's Name</b> (Last Name, First Name)		
<b>(3) Current Position</b> (Title & Grade)		<b>(4) Office/Center</b>		
<b>(5) Quarterly Review Initial and Date</b>	<b>1<sup>st</sup> Quarter</b>	<b>2<sup>nd</sup> Quarter</b>	<b>3<sup>rd</sup> Quarter</b>	<b>4<sup>th</sup> Quarter</b>
<b>Employee</b>				
<b>Supervisor</b>				

<b>A. KNOWLEDGE AND SKILLS</b>	
The employee should have conducted a self-assessment to evaluate skills, strengths, and developmental areas. Please document current interests, values, knowledge and skills, and abilities below. The supervisor should provide input and guidance.	
<b>1. Employee Knowledge and Skills Strengths</b>	<b>2. Employee Knowledge and Skills Opportunities for Improvement</b>
<b>B. JOB-RELATED DEVELOPMENT</b>	
Use this section to document specific job-related developmental goals (immediate and long range).	
<b>1. Short-Term (6-12 months) Job-Related Developmental goals:</b>	
<b>2. Long-Term (1-3 years) Job-Related Developmental goals:</b>	

### C. ACTION PLAN SECTION

This section describes specific knowledge and skills (from Section A) that you intend to pursue. Try and be creative by using a variety of learning strategies and activities. Activities could include; rotational assignment, classroom training, on-the-job training, experiential (hands-on) assignments, on-line courses, seminar or conference, shadowing opportunities, developmental assignments, self-directed learning (reading, researching, writing an article or report), learn by teaching others (process or method), participate in discussion groups, mentoring, participation in professional associations, and certification programs. Include specific scheduled dates and courses when applicable. The level of specificity you use when writing your IDP is up to you and your supervisor. However, when you submit a training request you must also include a copy of your IDP. At that time, the approving office may require additional information to approve the training request. Proposed developmental activities should be discussed and approved by manager. Activities and courses requiring funding are subject to the availability of funds and the required approval process.

**Please attach/include additional copies of this page as needed (copies are available on the DIG).**

1. Specific Knowledge or Skill	2. Activity Description	3. Manager's Role (or involvement of others if applicable)	4. Time Frame	5. Outcome/ Result (to be completed after activity)

*I agree that a meaningful discussion has taken place about this employee's individual development within ODA. Further, I propose the above activities to enhance the employee's skills.*

EMPLOYEE (signature): \_\_\_\_\_

SUPERVISOR (signature): \_\_\_\_\_

### C. ACTION PLAN SECTION (Continued)

Please attach/include additional copies of this page as needed (copies are available on the DIG).

1. Specific Knowledge or Skill	2. Activity Description	3. Manager's Role (or involvement of others if applicable)	4. Time Frame	5. Outcome/ Result (to be completed after activity)

**D. SUPPLEMENTAL INFORMATION and ADDITIONAL COMMENTS**

Use this section to expand on any of the areas above or to add any additional comments.

## Individual Development Plan (IDP) Quick Guide

Individual Development Plans (IDPs) are an effective tool to help employees articulate and achieve their developmental goals and specific training needs. Creating an IDP is a joint partnership between the employee and supervisor. IDPs help employees and supervisors identify the skills needed to meet professional goals and help the Agency identify and meet strategic training objectives.

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.

<b>1</b>	<b>Pre-Discussion Planning and Self- Reflection</b> The purpose of the pre-discussion planning phase is to prepare the supervisor and employee for their joint discussion. 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. The employee should conduct a self-assessment of current job proficiency, skills, strengths, and developmental areas; examine interests and values; establish your goals and priorities; and examine management priorities.
<b>2</b>	<b>Employee-Supervisor IDP Discussion</b> The employee-supervisor IDP discussion provides the opportunity for open dialogue about all that has been considered during the pre-conference planning phase. Discuss the new skills, knowledge, and experiences the employee would like to acquire. Do these goals match personal and career interests? Are the goals in agreement with ODA's goals, mission and vision?
<b>3</b>	<b>Prepare and Select Optimum Developmental Activities</b> The matching of identified developmental needs with available development opportunities is a major step in the IDP process. A variety of developmental approaches and strategies should be considered.  Identify the gap between the current situation and the desired outcome. This will produce a statement of purpose that should clarify why you want to learn something, and what specific skills, knowledge and abilities you wish to develop. Consider constraints such as time, cost, and personal responsibilities. There are four basic types of developmental experiences to consider in planning the IDP: On-the-job-training, Formal classroom training, Self-Development, and Developmental activities. Identify what skills, knowledge, and abilities are to be acquired or enhanced. Remember that this is only a plan, not a rigid promise; the IDP can and should be revised as goals change and as learning occurs.

4	<b>Implementing and Refining the IDP</b> Before starting to carry-out the IDP, the employee and supervisor should confer (employee should seek feedback with mentors, SMEs, colleagues, or HRO if available) for another view of your learning needs and strategies. This will help insure that earning will not only be based on personal needs but will also be relevant to ODA's goals, and results. The IDP form is simply a means of formally documenting the development plan. Once the employee-supervisor discussion has been held, the designated form should be completed and put into action. The IDP should be revised and modified as necessary																								
	<table><tr><th>Step</th><th>Who</th><th>Responsibilities</th></tr><tr><td>1</td><td>Employee</td><td>Completes the form.</td></tr><tr><td>2</td><td>Employee and Supervisor</td><td>Discuss employee strengths and opportunities for improvement. Agrees on contents of the form.</td></tr><tr><td>3</td><td>Supervisor</td><td>Ensures the form is properly completed</td></tr><tr><td>4</td><td>Employee and Supervisor</td><td>Signs the form</td></tr><tr><td>5</td><td>Employee and Supervisor</td><td>Keeps a copy of the form</td></tr><tr><td>6</td><td>Supervisor</td><td>Forward a copy of the form to the designated IDP Coordinator or HR Officer</td></tr><tr><td>7</td><td>Employee and Supervisor</td><td>Implements the IDP and makes updates as needed</td></tr></table>	Step	Who	Responsibilities	1	Employee	Completes the form.	2	Employee and Supervisor	Discuss employee strengths and opportunities for improvement. Agrees on contents of the form.	3	Supervisor	Ensures the form is properly completed	4	Employee and Supervisor	Signs the form	5	Employee and Supervisor	Keeps a copy of the form	6	Supervisor	Forward a copy of the form to the designated IDP Coordinator or HR Officer	7	Employee and Supervisor	Implements the IDP and makes updates as needed
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5	<b>Evaluate Outcomes</b> <ul style="list-style-type: none"><li>• After completing the projects in the IDP, the employee and supervisor should evaluate the success of these activities. What insights were gained? What new understandings does the employee have? What new skills, abilities and knowledge were acquired? What experiences did you have, and what did you learn from them? How do you feel about this process? The Supervisor and Employee should evaluate the outcome of training and development experiences regularly.</li><li>• Adjustments and updates should be made to the plan as needed</li><li>• Review the accomplishments and successes of this project with your supervisor (and others, as appropriate). Then update your learning plan for the next cycle. Remember that learning and growth are processes that may, and should, continue indefinitely.</li></ul>																								
	All ODA IDPs will be cumulatively assessed to identify the agency's strategic training needs and set priorities. This process provides the Training Office with a tool to evaluate training needs and total budget data regarding training, as well as assessing employee development and resource needs.																								