Headquarters Marine Corps

Individual Development Plan Handbook

Human Resources and Organizational Management Branch
Administration and Resource Management Division
Director, Marine Corps Staff

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INTRODUCTION

This manual was developed by employee development specialists in Human Resources and Organizational Management (HROM) to assist employees and supervisors in establishing Individual Development Plans (IDPs). It is based on the Headquarters, U.S. Marine Corps (HQMC) IDP format provided in the appendix, but that format can and should be modified as needed to fit organizational or program requirements. For example, mentor signature blocks can be added to incorporate Marine Corps Civilian Leadership Development Program (MCCLDP) requirements into the same plan rather than having two separate IDPs for MCCLDP participants.

Definition of an IDP

The IDP is a developmental tool to help employees reach performance objectives and career goals within the context of the organization mission and goals. It works best when the employee and the supervisor work together to create the IDP. Using the IDP benefits both the employee and the organization. Employees benefit by enhancing their knowledge, skills and experiences to help them achieve personal and career goals. The organization benefits by developing improved employee capabilities and job performance. Competent employee performance, plus the added bonus of improved morale and personal job satisfaction, will make the organization more effective.

The most common reasons for establishing an IDP are to:
- Improve job performance
- Increase interest, challenges, and satisfaction in the current position
- Obtain competencies necessary for future career growth

When to Prepare an IDP

The best time to prepare the IDP is at the beginning of the appraisal period when setting job objectives and performance standards for the year. As part of that process, supervisors and employees should discuss developmental needs and establish IDPs that will help the employees improve their performance and enhance their contribution to the mission, as well as gain competencies to support their career goals.

What is in an IDP

IDP formats vary from organization to organization, but they all have common elements such as:
- Goals -- The employee's short and long-term career goals
- Developmental objectives -- Brief action statement that describes the knowledge and skills the employee wants to improve and why
- Developmental activities -- One or more specific developmental activities to enable the individual to achieve the desired knowledge or practice and improve the desired skills
- Timeline -- Realistic target dates are established for each activity, and completion dates are entered when the activity is finished.
- Results -- Upon completion, the employee and supervisor discuss and document the level of proficiency gained in reaching the developmental objective. If results were less than desired, another developmental activity may be added to the IDP.

An IDP is…

- A developmental partnership between the individual and supervisor. IDP preparation involves feedback, clarification, and discussion about developmental needs, goals, and plans. Supervisor-subordinate communication is key to the success of the IDP process.
- A vehicle to address the needs of the individual and the needs of the organization. The best IDPs begin with a plan to maximize current job performance. The activities can assist the individual in meeting both personal and organizational goals for success.
- A tool to identify a person's developmental needs based on a comparison of skills required by a job and present abilities. It identifies specific competencies for which the person requires development.
- A tool to facilitate a relationship between a mentor and the person to be mentored.
- A broadly defined developmental plan that includes on-the-job assignments, self-development activities, and formal classroom training.
- An active and ongoing process. An IDP is a living process that encourages individual empowerment and growth. Ideally, IDPs should be reviewed, updated, and changed as needed at least every six months.

An IDP is not:

- A one-time activity.
- A performance appraisal. The IDP should not be used as a means to formally assess the individual's performance and should not be used for human resources decisions. It does not replace the performance appraisal, awards, recruitment, and promotion systems.
- A contract for training. An individual should include training interests on an IDP, but that training is not guaranteed. All training requests are subject to supervisory approval and funding availability.
- A way to clarify or revise a position description. If a position description does not accurately describe the duties performed, this is a matter for the individual, supervisor, and the HROM Advisor to resolve. An IDP does not solve this problem.
- A guarantee of promotion to a higher grade or salary. An IDP can help prepare a person to become qualified for a higher position, but does not imply a guarantee of promotion.

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EMPLOYEE STEPS FOR PREPARING AN IDP

Step 1. Draft short-term goal(s)
- Identify the assignments or job duties you would like to complete during the year, or the contributions you would like to make during the year in your current position.
- Draft your short-term (1 year) goal or goals using an action statement that describes what you want to do and why. Your short-term goal(s) should align with your job objectives, performance standards, and organizational mission and goals.
Example: Learn more about our other functional areas, to expand our section's ability to support our customers.

Step 2. Draft long-term goal(s)
- Review your current interests and values. Ask questions such as:
    - What do I value? What factors are most important to my job satisfaction? How satisfied am I in my current job? If I wanted to make a change, what would it be?
    - How do others see me? How do I want to be seen?
- Examine the options available. Ask questions such as:
    - Do I want to move up or over to a new organization?
    - Do I want to enrich my present job? Develop new skills? If so, which ones and why?
    - Talk with supervisors, managers, and/or your mentor to see what options are available within your organization.
    - Use the Civilian Workforce Development Application (CWDA) https://**cwda**.manpower.**usmc**.mil or meet with the appropriate Community of Interest (COI) program manager to research job positions and career paths in the Marine Corps for the career fields you are interested in.
- Define your long-range (2-3 years) goals using an action statement that describes what you want to do and why.
Example: Move up to a supervisory position to refine my leadership skills and gain experience for future advancement into senior management.

Step 3. Review your goals. Ask questions such as the following, and adjust goals appropriately.
- 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?

Step 4. Identify Developmental Objectives
- Review your most recent performance appraisal, if applicable.
- If you haven't already discussed developmental needs with your supervisor, schedule a meeting to do so.
- List the knowledge, skills, and abilities you need to gain or enhance now, to improve your performance and meet your short-term goal(s).
- List anything you need to learn to keep abreast of changes in your career field and in your organization.

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- List the knowledge, skills, and abilities you need to acquire or improve to meet your long-term career goals.
- Draft developmental objectives as action statements that clearly describe the knowledge, skills, and abilities you need to acquire or improve.
  Example: Gain proficiency in designing surveys and analyzing results.

Step 5. Identify one or more developmental activities for each developmental objective.
See Appendix 1 for a list and description of developmental activities and Appendix 2 for training and development resources.

- Identify formal training options to achieve your developmental objectives, such as classroom training, conferences, on-line courses, off-duty education, etc.
- Explore externally-funded training opportunities such as the CCLD and Academic Degree Programs or your Community of Interest training programs.
- Review the list of no-cost developmental activities in this manual, and identify no-cost projects and other learning activities to support your developmental objectives.
- Narrow down the options you listed above, to identify those that would be most effective and affordable/feasible in gaining the required knowledge, skill, or ability.

Step 6. Create your draft IDP following the instructions in the HQMC IDP Format. *See Appendix 3 for the IDP format, instructions, and sample IDPs.*

Step 7. Review your draft IDP with your supervisor, make adjustments if needed, sign, and implement the actions.

SUPERVISOR TIPS FOR REVIEWING IDPs

Analyze 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 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?

Review 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?

Below is a description of the most commonly used learning and development activities. The list is not all-inclusive. Any activity is useful if it meets the individual development goals and objectives in the IDP.

Formal Training - Classroom training such as job specific training (e.g. Federal Budgeting, Statistics, Management Analysis) or general skills training (e.g. Effective Writing, Interpersonal Communication Skills). Usually more cost involved but more effective than self-paced training for more complex subjects or those that require group interaction. *See Appendix 2 for training resources.*

Self-Paced Training - On-line training, correspondence course, or other distance learning in which the individual proceeds at their own pace (sometimes within a specified time period). Normally less cost than classroom training but may not be appropriate for all situations. Individual must be able to manage time to complete the training on schedule while meeting all job requirements. Supervisor must be able to give the individual time to complete the training on the job. *See Appendix 2 for training resources.*

Job Rotation or Shadow Assignment - The individual temporarily moves into another work unit or another position to gain additional knowledge, skills, or abilities. In a job rotation, the individual actually learns and performs the work of another position. Job rotations may be in the form of details or temporary reassignments. In a shadow assignment, the individual observes an expert and discusses what they observe. Useful if the individual needs to have a broad understanding of other functions to perform their duties, to cross-train members of a team, or to support career development goals. Requires the individual to suspend performance of current duties; supervisor must be able to get that work done in other ways.

Special Project or Collateral Duties - A special project is a temporary additional assignment of short duration, such as to lead or participate on an ad-hoc cross-functional team, conduct research and prepare a report, or learn a topic and then present it to others. Project can be tailored not only to meet the individual's development needs, but also to share what is learned with others in the work unit. Collateral duties are a more permanent assignment of duties outside an individual's normal range of responsibilities that provide a broadening experience. For example, a person may be assigned space planning responsibilities in order to enhance analytical and reporting skills. Unlike job rotation, an individual with special projects or collateral duties usually continues to perform regular duties.

Committee/Task Force Participation - Involvement in workforce groups or special emphasis groups. Participation during work hours would require supervisory approval and would need to be balanced against work requirements and priorities.

Coaching - Learning technique that involves observing an individual at work and providing feedback to enhance performance or correct deficiencies. Can be used to develop needed skills and abilities in either the person assigned as coach or the individual being coached, or both.

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Learning Groups - Gatherings of individuals who meet to focus on their own learning and development in a particular interest area, usually over lunchtime or early morning meetings that don't interfere with daily work schedules. It could be a local chapter of an established organization such as Toastmasters, or a more informal lunchtime learning group centered around certain competencies or skills, with members taking turns researching and presenting a topic or sharing lessons learned with one another.

Off Duty Self-Development - Such activities might include taking evening or weekend courses at local schools, using correspondence and other individualized courses, reading books and other publications or journals, or attending and actively participating in professional or technical societies, civic activities, or advisory boards.

Civilian Workforce Development Information and Advisory Services

The civilian workforce development specialists in the HROM Organizational and Workforce Management Section (ARHM) provide employee training and development advice and support services to Marine Corps activities in the National Capital Region and Quantico. Services include providing information on civilian training regulations and policies, advising employees and supervisors on civilian workforce development topics, identifying training and development needs, and building training and development plans to meet those needs within current and projected budgetary constraints. Specialists can assist employees and supervisors in creating IDPs and identifying appropriate training and development activities based on the IDP goals and objectives.

Contact HROM (ARHM) by telephone at (703) 604-2755, by visiting Room 2R225, Naval Support Facility – Arlington, or by email mailto:smb.hqmc.arhb.trng@usmc.mil. For additional information, please visit the HROM (ARHM) Website at http://www.marines.mil/unit/hqmc/hr/Pages/ARHM_WD.aspx

For information about Marine Corps wide civilian workforce development, please see the webpage at https://www.manpower.usmc.mil/

Other Informational Sites

| USMC Civilian Marines Site | https://www.manpower.usmc.mil/ |
| Office of Personnel Management | http://www.usalearning.gov/USALearning/index.htm |

Free Training Sources

HROM-sponsored on-site classes:	http://www.marines.mil/unit/hqmc/hr/Pages/ARHM_Training.aspx
MarineNet	https://www.marinenet.usmc.mil/marinenet/
Navy Knowledge Online	https://www.nko.navy.mil/
Army Knowledge Online	www.us.army.mil
Defense Acquisition University	http://www.dau.mil/

Commercial Training Sources
Note: This is a representative sample, not meant to be all-inclusive. Suggestions are welcome for future additions to this list (mailto:smb hqmc arhb trng@usmc.mil)

American Management Association	http://www.amanet.org/index.htm
Fred Pryor Seminars	http://www.pryor.com/Site/BrowsePS.aspx
Learning Tree	http://learningtree.com/
Linkage, Inc.	http://www.linkageinc.com/learning_events/
Management Concepts	http://www.managementconcepts.com
National Seminars Training	http://www.nationalseminarstraining.com/
Northern Virginia Community College	http://www.nvcc.edu/
Project Management Institute	http://www.pmi.org/Pages/default.aspx
SkillPath	http://www.skillpath.com
USDA Graduate School	http://grad.usda.gov/
The Performance Institute	http://www.performanceweb.org/

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HQMC INDIVIDUAL DEVELOPMENT PLAN (IDP)

PART I - EMPLOYEE DATA	
NAME:	**TIME PERIOD COVERED:**
POSITION/PAY PLAN/OCCUPATIONAL CODE/GRADE:	**ORGANIZATION:**

PART II - CAREER GOALS
SHORT-TERM GOALS (1 year):
LONG-TERM GOALS (2-3 years):

PART III - DEVELOPMENTAL NEEDS				
Developmental Objective	**Developmental Activity**	**Target Completion Date**	**Actual Completion Date**	**Outcome Achieved**

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PART III - DEVELOPMENTAL NEEDS (CONTINUED)				
Developmental Objective	Developmental Activity	Target Completion Date	Actual Completion Date	Outcome Achieved

PART IV: SIGNATURES	Signature and Date IDP Established	Date Updated/ Initials	Date Updated/ Initials	Date Updated/ Initials
Employee				
Supervisor				

INSTRUCTIONS FOR COMPLETING THE INDIVIDUAL DEVELOPMENT PLAN (IDP)

Below are basic instructions for completing the IDP format. Please see the HQMC IDP Handbook for more detailed step-by-step instructions, list and description of typical developmental activities, and a list of training and development resources.

TO BE COMPLETED BY EMPLOYEE

PART I: Enter appropriate data.

PART II: Briefly describe your short-term 1-year goal(s) in your current position. (Example: Become a subject matter expert in "xyz" to expand our office's ability to support customers.) If you wish, include longer-term career goals over the next 2 to 3 years.

TO BE COMPLETED BY EMPLOYEE AND SUPERVISOR

PART III (first 3 columns):

Build your developmental plan to meet your goals, review it with your supervisor, and modify if needed, as follows:

Developmental Objectives

Write a brief action statement describing what knowledge or skill you need to obtain or improve to meet the goals in PART II. (Example: Become familiar with federal regulations and implementing guidance regarding "xyz" program.) Prioritize the objectives, starting with those needed to meet your short-term goals, and list them in priority order in the first column of PART III.

Developmental Activities

In column 2 of PART III, describe the formal training course or other developmental activity that will most enable you to achieve that objective. If you have more than one activity for the same objective, use a separate row for each activity.

Target Completion Dates

In column 3, enter a realistic target date for completing each activity, balancing the date against workload demands and the other activities in your IDP.

Review With Supervisor

After you have completed all the above items on your IDP, now is the time to review it with your supervisor, modify it if needed, and move on to the first signature in PART IV.

PART IV: Sign and date the IDP to indicate the IDP has been established.

PART III (last 2 columns):

As you complete each developmental activity, write in the actual completion date in column 4 of PART III. In column 5, Outcome Achieved, describe to what extent you gained or improved your proficiency as stated in the objective. Discuss with your supervisor to determine if more developmental activities are needed for that objective.

UPDATES: Decide with your supervisor how often to update and initial the IDP in PART IV.

SAMPLE 1 (NON-SUPERVISOR) HQMC INDIVIDUAL DEVELOPMENT PLAN (IDP)	
PART I - EMPLOYEE DATA	
NAME: Peter Winters	**TIME PERIOD COVERED:** 1 Oct 2009 - 30 Sep 2010
POSITION/PAY PLAN/OCCUPATIONAL CODE/GRADE: Management Analyst-GS-343-12	**ORGANIZATION:** Department X

PART II - CAREER GOALS
SHORT-TERM GOALS (1 year): Expand my contributions to our division's mission and goals.
LONG-TERM GOALS (2-3 years): Move up to a supervisory position to advance in my career.

PART III - DEVELOPMENTAL NEEDS				
Developmental Objective	**Developmental Activity**	**Target Completion Date**	**Actual Completion Date**	**Outcome Achieved**
1. Enhance my analytical skills to improve performance of job objective #1	1a. <u>Management Analysis: Advanced Applications</u>, USDA Grad School, , 4 days, $945, proposed dates 11-14 February	14 February		
1. Enhance my analytical skills to improve performance of job objective #1	1b. Design and conduct a study on a subject that is relevant to current issues my office is facing. Prepare report and presentation. Deliver presentation to supervisor and co-workers and receive feedback.	30 April		

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PART III - DEVELOPMENTAL NEEDS				
Developmental Objective	**Developmental Activity**	**Target Completion Date**	**Actual Completion Date**	**Outcome Achieved**
2. Learn more about our section's other functional areas, to expand my ability to support our customers.	Interview SMEs and shadow them for a week. Write a report summarizing learning and insights. Include recommendations to improve customer support.	15 June		
3. Assess and improve leadership skills.	Join The Civilian Leadership Development Program. Take 180 assessment with supervisor, work with mentor and supervisor to add needed leadership skill objectives to this IDP.	31 January		

PART IV: SIGNATURES	**Signature and Date IDP Established**	**Date Updated/ Initials**	**Date Updated/ Initials**	**Date Updated/ Initials**
Employee	Peter Winters 15 Nov 2009			
Supervisor	Gloria Williams 15 Nov 2009			

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SAMPLE 2 (SUPERVISOR) HQMC INDIVIDUAL DEVELOPMENT PLAN (IDP)

PART I - EMPLOYEE DATA	
NAME: Gloria Williams	**TIME PERIOD COVERED:** 1 Oct 2009 - 30 Sep 2010
POSITION/PAY PLAN/OCCUPATIONAL CODE/GRADE: GS-301-13	**ORGANIZATION:** Department X

PART II - CAREER GOALS

SHORT-TERM GOALS (1 year):
Update our strategic plan and put processes and procedures in place to implement the plan.

LONG-TERM GOALS (2-3 years):
Advance into position of higher responsibility where I can continue to learn and grow and contribute.

PART III - DEVELOPMENTAL NEEDS

Developmental Objective	Developmental Activity	Target Completion Date	Actual Completion Date	Outcome Achieved
1. Learn best practices in strategy execution	Strategy Execution: Getting It Done, AMA, $1,794, 7-10 January	10 January		
2. Gain experience in managing diverse groups	Volunteer as President of Executive Board of Directors for local civic organization (off duty)	one-year term with option to extend		
3. Pursue executive leadership development opportunities	Apply/compete for USMC quotas to centrally managed executive leadership development program(s)	ongoing as announced		

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PART III - DEVELOPMENTAL NEEDS				
Developmental Objective	Developmental Activity	Target Completion Date	Actual Completion Date	Outcome Achieved

PART IV: SIGNATURES	Signature and Date IDP Established	Date Updated/ Initials	Date Updated/ Initials	Date Updated/ Initials
Employee	Gloria Williams 15 Nov 2009			
Supervisor	Jose Gomez 17 Nov 2009			

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