# Individual Development Plan

An individual development plan (IDP) is:

* A clear statement and roadmap of a mentee’s development goals,
* A contract or agreement between the mentor and mentee,
* An individually-tailored action plan to develop specific competencies (knowledge and skills) needed to improve performance in present position or to prepare for new responsibilities,
* A tool for a mentor to estimate resources needed for mentee development training, and
* A tool for the Consultants Practice Specialty (CPS) to assess the value and effectiveness of mentoring relationships.

The critical factors throughout all phases of the IDP process are interaction and effective communication between the mentee and mentor. For the process to be effective and meaningful, each phase must be approached as a joint endeavor.

## The IDP Process

The IDP process consists of four phases. The table gives an overview of the process and information on how to complete each phase.

*Phase What Needs to be Done?*

1. Pre-Conference Planning (Application, Matching to Mentor)
2. Mentee-Mentor Conference (After Matching, can be virtual)
3. Selecting Optimum Developmental Activity(ies)
4. Preparing the IDP Form

## *Pre-Conference Planning*

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

This section describes specific roles and responsibilities related to pre-conference planning. As you will see, both the mentee and the mentor have many questions to answer and things to consider in preparation for the mentee-mentor conference. The following table gives an overview of the pre-conference planning process:

|  |  |
| --- | --- |
| Mentee’s Role | Mentor's Role |
| Ask: Where Have I Been?  Ask: Where Am I Now?  Ask: Where Can I Go? | Review the IDP or prior history  Review current performance level  Consider future possibilities for mentee |

## Who Is Responsible for Developing an IDP?

Developing an IDP is a collaborative effort.

## Mentee’s Responsibilities

This pre-planning process should enable the mentee to enter the mentee-mentor conference with some confidence and a firmer perspective on where he/she is going. It is helpful to remember that as a mentee you have a two-fold role in developing your IDP. The mentee should assess the past/current condition and plan the future state/outcome.

*Where Have I Been?* To determine where you have been, consider all previous training, development, and job experiences. Include:

* On-the-job training
* Formal training
* Developmental assignments and
* Self-development activities.

*Where Am I Now?*To determine where you are now, review your present business or position description, performance elements, performance standards and past performance evaluations. Think about the work performed over the past year and develop these lists:

* I am good at these parts of my job:
* In general, I am good at this kind of work:
* These skills or technical competencies are necessary to perform my current duties:
* I need to develop or strengthen these competencies:
* I need these kinds of assignments or training to develop or strengthen these competencies:

*Where Can I Go?*To determine where you can go, focus on these major areas:

* Skills, knowledge, and abilities which you are interested in obtaining
* Short-range goals
* Long-range goals

## Mentor's Responsibilities

In preparing for the mentee-mentor conference, the mentor should remember that he/she serves in the following roles:

*Consultant*: Provides insights about mentee’s skills and potential and suggests ways to develop these skills and where mentee should focus efforts.

*Advisor:* Shares knowledge about the profession, personal career experiences and specific position required or recommended training.

*Planner:* Gives insight into the mentee IDP and decides what is in the best interest of the profession as a whole.

*Evaluator:* Determines if the investment in the training and developmental activities resulted in improved individual and organizational performance.

## *Mentee-Mentor Conference*

The mentee-mentor conference provides the opportunity for open communication about all that has been considered during the pre-conference planning phase.

The mentee and mentor each have specific responsibilities to ensure that the conference is effective and that objectives are met so that an IDP form can be prepared.

## Mentee’s Responsibilities

* Review short- and long-range goals.
* Ask: Are the goals realistic? Discuss the business/organization's goals, needs and priorities. To what extent do my individual goals mesh with those of the business? Are the goals attainable? What is my level of commitment toward attaining the goals?
* Review current technical and/or skills competencies.
* Ask: What competencies do I have to meet my goals? What competencies do I need to develop?
* Identify developmental needs by determining the difference between the competencies I currently have and those needed to meet my goals.
* Rank developmental needs based on the organization's organizational needs and priorities, as previously reviewed.
* Discuss training and developmental activities to meet my needs.
* Select developmental activities and training that will meet my needs. Consider a variety of developmental approaches and strategies, and listen to the mentor's ideas

## Mentor's Responsibilities

During the conference, the mentor should:

* Provide feedback to the mentee on everything discussed, striving for a two-way discussion,
* Be realistic and objective about which activities will best suit the needs of the mentee, as well as the broader needs of their business/organization,
* Discuss in detail the optimum developmental activities that are possible and appropriate,
* Take time to prioritize the developmental activities with the mentee and
* Identify criteria used to evaluate mentee’s development.

## *Selecting Optimum Developmental Activities*

The matching of identified developmental needs with available development activities (training and non-training) is a major step in the IDP process.

A variety of developmental approaches and strategies should be considered. We often think of training only in terms of formal training courses. Four types of developmental experiences should be considered in planning the IDP:

* On-the-job-training
* Formal classroom training
* Self-development
* Developmental activities

While all four types of experiences have their advantages and disadvantages, it is crucial to choose the appropriate experience that most effectively and efficiently meets your specific needs. Although it would be ideal to incorporate a combination of all four types, the resources available to the mentor may not make this possible. That is why an open discussion between the mentee and mentor concerning all options is necessary to pinpoint what is feasible.

## *Preparing the IDP Form*

## How to Write a Great Individual Development Plan (IDP)

An individual development plan (IDP) is a tool that helps facilitate mentee development. It’s a two-way commitment between a mentee and their mentor on what they are going to do to grow.

## Start with a goal; have a reason to develop

There needs to be a reason to develop. If there’s no reason to improve – or no motivation, then there’s no reason to have an IDP.

***Identify what you want to learn*** or get better at Identify the three most important competencies (skills, knowledge, attributes) that you want to work on in order to achieve your goal. If you’re new in a role, these will most likely be unfamiliar functional areas with which you’ve had little prior experience. Or it may be getting to know your new organization or team. If you’re struggling in a role, these things may have been identified in your performance appraisal, a 360-leadership assessment, or feedback from clients, your mentor, or a coach. To prepare for a new role, you’ll need to identify the required competencies for that new role that you don’t yet have.

For **leadership development**, having access to a leadership competency model can help you identify the leadership competencies your clients have identified as critical for any leader. You can assess yourself, ask your mentor for feedback, or ask clients for an assessment.

Ask questions to get at the what and why. That helps to identify the competency, the reason, and the relative importance. People sometimes struggle to put a “label” on the need, so having that competency model helps us do that (“OK, so it sounds like you want to work on your leadership presence, or strategic thinking, or you need to improve your financial acumen – is that right?”).

You should **identify your strengths**. Strengths can often be enhanced and also be leveraged in order to address development needs.

## Identify “development actions” to address the needs

Here are the most common development actions, listed in order of developmental impact:

* Move to a new job
* Start a new consulting business
* Take on a challenging assignment within your current job
* Learn from someone else (your mentor, a coach, a subject matter expert or role model)
* Get educated on a topic: take a course, read up on the topic

Sometimes, if you aspire to a larger role, the most important step in your development plan is to identify the role or roles to take in order to get you ready, often a lateral move. However, given that job changes are significant and don’t happen all that often, a challenging assignment is usually the best way to develop a competency or competencies. It’s those “stretch assignments” that force us to perform, learn, and have the most impact. The other advantage of a developmental assignment is that they combine real work with development. Otherwise, an IDP can become an “extra” thing to do when you have time, and of course, never gets done.

Then, once that project is identified, identify people that can help you learn the new skills required to be successful with that project (the same skills identified in step 2). For example, if that new project is going to require you to lead change, find 2-3 people that are good at leading change and go talk to them. An internal or external coach may be able to help with tough to learn attributes, like relationship building. A mentor can often help you develop political acumen, or organizational agility.

Finally, identify any courses, books, or websites on the topics you want to learn.

***Assign dates and who’s responsible for what***

The date helps you get specific and keep your commitment. While you’ll be responsible for most of your plan, your mentor may have a few things he/she commits to doing to support you.

***Discuss your plan with your mentor***

By both of you signing the plan, it’s the two-way commitment or contract to which you agree.

***Implement the plan, follow-up often, and reflect on what you’ve learned***

Keep your plan in front of you at all times. Check off those items you complete, you’ll feel a sense of accomplishment. Think about what you did, what you read, what you learned. What were the lessons? What should you incorporate as a permanent part of your repertoire? What should you reject? What did you learn about yourself?

**INDIVIDUAL Development Plan (IDP) – for CPS MEMBERS**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **GENERAL INFORMATION** | | | | | |
| Mentee Name | | | Mentor Name | | |
| Mentee E-Mail Address | | | Mentor E-Mail Address | | |
| Mentee Telephone Number | | | Mentor Telephone Number | | |
| Desired Outcomes and Goals | | | CPS Team Member | | Date Mentor Assigned |
| **DEVELOPMENT PLAN** | | | | | |
| **Elements** | **Planned  Method of Assessment** | **Anticipated Outcomes and  Anticipated Completion Dates** | | **Achieved Outcomes and   Completion Dates** | |
|  |  |  | |  | |
| Mentee Signature: Mentor Signature: Plan Development Date: | | | | | |

**INDIVIDUAL Development Plan (IDP) - INSTRUCTIONS**

This plan should be finalized by the mentor during a meeting (by telephone or face-to-face) within two weeks of assignment to the mentee. The plan should be jointly developed for a development period not to exceed six months. The idea is to develop a game plan to set the initial goals and objectives. These plans may certainly change during the course of the process and can be revised accordingly.

|  |  |  |  |
| --- | --- | --- | --- |
| **INDIVIDUAL DEVELOPMENT PLAN – INSTRUCTIONS** | | | |
| **Elements** | **Planned  Method of Assessment** | **Anticipated Outcomes and  Anticipated Completion Dates** | **Achieved Outcomes and   Completion Dates** |
| This column is for the knowledge, skills and abilities that are desired outcomes for the relationship.  These may include skills or knowledge about such matters as:   * Business acumen * Finance and accounting * Marketing and Sales * Social media * Communications * Client retention * Project management * Branding * Networking * Presentation skills * Legal matters * Insurance * Bonding | This column will be completed during the first meeting between mentor and mentee. This space is for the mentor and leader to determine how the elements in the column to the left will be addressed – in other words, how will the mentee and mentor know that the leader can apply each of these elements?  What activities will be planned in order to reach these required elements (e.g. self-study, one-on-one meeting, reviewing a lesson, observation, reading a book)?  How will the mentor make a formative assessment of the level of knowledge and/or skills of the candidate? What types of formative assessment tools will the mentor use (reflective questioning, direct questions, observation, case study, observation and feedback  What are best methods of communication (e.g. face to face, phone, email, distance, pre-conferences, post-conferences? How often will we communicate? What will be the outcomes of our communication (e.g. written notes, logs, progress sheet, tracking, feedback, reflection, action plans, etc.)? | This column is also completed during the first meeting to determine what specific deliverables and timelines are anticipated.  What criteria will the mentor use to assess competency in these areas (in other words – what objective measures will you use to assess performance)?  ❏ What are the specific outcomes you can measure because of the activities you have planned?  ❏ How does the formative assessment process fit into the timeline?  ❏ How much does the candidate have already in terms of competencies, how much left to learn?  What is the estimated overall timeline required to accomplish this? Is it realistic and achievable? What barriers exist to the timeline? What specific activities do you anticipate happening on what dates? | This column completed after each of the elements on the left has been completed.  - What was done in each of the required elements?  - What were the results and when were they accomplished? |