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Individual Development Plan

Introduction

What Is an IDP?

An Individual Development Plan (IDP) is:

- A clear statement of an employee's career goals,
- A map for attaining goals that specifies immediate and long-range developmental needs,
- 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 written plan for scheduling and managing an employee's development,
- A tool for a supervisor to estimate resources needed for employee development training,
- An agreement between the employee and supervisor based on funds available to meet the employee's and the organization's goals and
- A tool for an organization to develop its workforce to meet future needs.

Purpose of the IDP

Most employees want to grow in their present positions or progress to new ones. To do this effectively, a realistic action plan is needed. An IDP can be a useful tool to help plan a career, guide development and assess progress toward career goals and objectives.

Benefits to Employees and Supervisors

IDP's shall provide meaningful training plans that will help the:

EMPLOYEE to...	SUPERVISOR to ...
Perform duties according to established job standards, Improve job performance, Set reasonable goals, Assess particular strengths and weaknesses and, Schedule and plan own individual development each year. To benefit from an IDP, you must be involved and make a serious commitment to your career future. It may take several hours of your time, but it's an effort that should later prove to be well worth the investment.	Aid in the development of their employees to achieve the knowledge, skills and competencies according to their performance standards, Accurately document the current developmental needs of their employees and , Consider the unit's and/or agency's organizational needs, mission changes, changes in technology, expected turnover, staffing needs, program plans and future needs for particular skills.

Who Is Required to Have an IDP?

IDP's are required for all:

- permanent full-time Federal and non-Federal County Office employees
- County Operation Trainees (COT's)

Note: For new permanent, full-time employees, an IDP is required 90 days after the employee reports for duty.

When Should an IDP Be Prepared?

IDP's should be prepared annually at performance appraisal

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- [Career Transition and Job Search \(CTAP and ICTAP Eligible\)](#)
- [Training Conference Guidelines](#)
- [Management Training](#)
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time for those individuals requiring IDP's.

Relationship Between the IDP and Performance Appraisals

An IDP and a performance appraisal have the same focus; fostering individual and organizational improvement. However, a performance appraisal is more like an end-of-year profit and loss statement while an IDP is an investment plan. They should work together, but they have different orientations.

As part of the annual performance appraisal process, the supervisor analyzes the employee's job and its requirements and communicates expectations and performance standards to the employee. Then throughout the year, the supervisor assesses the employee's performance and gives feedback on a regular basis. At appraisal time, the supervisor compares the employee's performance to the previously established standards, makes a determination about performance level, discusses this with the employee and together they set standards for the upcoming appraisal period.

Section A - Overview Of The IDP Process

The IDP Process

The IDP process is a continuing cycle of planning, implementation and evaluation between an employee and supervisor, for the mutual benefit of both the employee and the organization. It is more than a swift review of course catalogs. It requires time to:

- Analyze job requirements,
- Assess current competencies and
- Make informed decisions about developmental needs.

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

Tools for the IDP Process

There are tools available for analyzing jobs to determine requirements. One that is readily accessible is the position description. Performance standards and performance elements also spell out job requirements.

Phases of the IDP Process

The IDP process consists of five phases. The following table gives an overview of the process and tells you where in this guide to look for information on how to complete each phase.

Phase	What Needs to be Done	Section
1	Pre-Conference Planning	B
2	Employee-Supervisor Conference	C
3	Selecting Optimum Developmental Activity	D
4	Preparing the IDP Form	E
5	Implementing the IDP	F

Section B - Pre-Conference Planning

Purpose of Pre-Conference Planning

The purpose of the pre-conference planning phase is to prepare the supervisor and employee for their joint conference. Both the employee and the supervisor 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.

Overview

This section describes specific roles and responsibilities related to pre-conference planning. As you will see, both the employee and the supervisor have many questions to answer and things to consider in preparation for the employee-supervisor

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to consider in preparation for the employee-supervisor conference. The following table gives an overview of the pre-conference planning process:

Employee's Role	Supervisor's Role
Ask: Where Have I Been?	Review performance appraisal
Ask: Where Am I Now?	Review performance standards
Ask: Where Can I Go?	Consider future possibilities for employee

The remainder of this section is divided into three major parts:

- Who is responsible for developing an IDP?,
- Employee's responsibilities and
- Supervisor's responsibilities.

Who Is Responsible for Developing an IDP?

Both the supervisor and the employee are responsible for developing an IDP. While the employee completes the IDP, with the cooperation and assistance of the supervisor, it is the supervisor who normally has to approve individual activities on the IDP. The supervisor is responsible for performance improvement, and the IDP process is an important tool to achieve that objective.

Developing an IDP is a collaborative effort. When the employee and supervisor systematically work through the steps in this guide, an important opportunity exists to:

- Discuss critical job requirements and responsibilities,
- Outline the knowledge and skills needed to perform the work,
- Identify an employee's talents and needs,
- Define individual job satisfaction and
- Improve both organizational and individual performance.

Employee's Responsibilities

This pre-planning process should enable the employee to enter the employee-supervisor conference with some confidence and a firmer perspective on where he/she is going. It is helpful to remember that as an employee you have a two-fold role in developing your IDP.

Initiator: Assesses current skills and competencies, explores developing options, looks at the needs of the organization and sees realistic, constant improvement as a responsibility to oneself and the agency.

Owner: Assembles information, weighs alternatives, makes trade-offs, and proposes objectives and activities.

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, read your present 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 managerial or technical competencies are necessary to perform my current duties: _____,
- I need to develop or strengthen these competencies: _____ and _____
- 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:

- Positions in which you are interested
- Short-range goals and
- Long-range goals.

Positions: The following table will help you determine where you can go and how to focus on positions you are interested in.

Step	Employee's Action
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1	Consider a range of options (such as, positions in your unit, other units of your agency, other USDA agencies or other Federal agencies) that might interest you.
2	To find out more about other unit positions, talk to the unit's supervisor or contact the servicing personnel office.
3	Based on this examination of options, decide on short-range goals (1-2 years) and long-range goals (2-5 years).

Short-Range Goals (1-2 years): The following table will help you establish short-range goals.

Step	Employee's Action
1	Identify the technical or managerial competencies needed to obtain your short-range goals.
2	Ask: <ul style="list-style-type: none"> • How strong or weak am I in these competencies? • Is it possible for me to develop these competencies? • What kind of training or developmental activities will enable me to develop these competencies?
3	Review short-range goals again to ensure that they are realistic and attainable.

Long-Range Goals (2-5 years): The following table will help you establish long-range goals.

Step	Employee's Action
1	Identify the technical or managerial competencies needed to obtain your long range goals.
2	Ask: <ul style="list-style-type: none"> • How strong or weak am I in these competencies? • What kind of training or experience will enable me to develop these competencies? • How much? • How long will it take? • Are resources (such as funding and training opportunities) available for me to develop these competencies? • What contribution can I make to the organization?
3	Review long-range goals to ensure that they are realistic and attainable.
4	Rank in priority all the technical or managerial competencies that need to be developed.

Now, the employee should be prepared for the employee-supervisor conference. The next block will describe the supervisor's preparations for the conference.

Supervisor's Responsibilities

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

Consultant: Provides insights about employee's skills and potential and suggests ways to develop these skills and where employee should focus efforts.

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

Planner: Gives insight into the employee IDP and decides what is in the best interest of the work unit as a whole.

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

The supervisor should consider the following points concerning the employee's development in preparing for the employee-supervisor conference:

- The employee's current level of performance and
- Future possibilities for the employee.

Step	Supervisor's Action
1	Review the employee's current performance appraisal.
2	Ask:

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	<ul style="list-style-type: none"> • What are the employee's strengths with regard to managerial or technical competencies? • Is the employee lacking some technical and managerial competencies to perform well? • How can the employee attain these competencies? • Are there any other problems that may be affecting the employee's ability to meet the performance standards? • What program resources can be used to help the employee improve competency levels?
3	Review the current performance standards used for the appraisal.
4	Ask: <ul style="list-style-type: none"> ◦ Were the performance standards too stringent in any area? ◦ Were the performance standards too lenient in any area? ◦ Do the performance standards need to be updated or revised? If so, how?
5	Consider the unit's and/or agency's organizational needs and strategic priorities over the next few years, along with the employee's needs and goals. Ask: <ul style="list-style-type: none"> • What changes in mission, technology, programs or staff are expected? • Should the employee be developed for added responsibilities? If so, what kind? Where? How? • What kind of development will the employee need to reach the goals? • What resources can be assigned to support this IDP?

Now, the supervisor should be prepared for the employee-supervisor conference.

Section C - Employee-Supervisor Conference

Purpose of the Employee-Supervisor Conference

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

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

Employee's Responsibilities

The following table describes what the employee should review and discuss with their supervisor during the conference.

Step	Employee's Action
1	Review performance appraisal results.
2	Ask: <ul style="list-style-type: none"> • Were the performance standards met? If not, why? If so, how? • What weaknesses were identified? Are technical or managerial competencies lacking? If yes, which? If not, is there any other problem affecting performance? • How can performance be improved?
3	Review short- and long-range goals.
4	Ask: <ul style="list-style-type: none"> • Are the goals realistic? • Discuss the unit's and/or agency's goals, needs and priorities. To what extent do my individual goals mesh with those of the unit and/or agency? • Are the goals attainable? • What is my level of commitment toward attaining the goals.
5	Review current technical and/or managerial competencies.
6	Ask: <ul style="list-style-type: none"> • What competencies do I have to meet my goals? • What competencies do I need to develop?
7	Identify developmental needs by determining the difference between the competencies I currently have and those needed to meet my goals.

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	and those needed to meet my goals.
8	Rank developmental needs based on the unit's and/or agency's organizational needs and priorities, as previously reviewed.
9	Discuss training and developmental activities to meet my needs.
10	Select developmental activities and training that will meet my needs. Consider a variety of developmental approaches and strategies, and listen to the supervisor's ideas. See Section D of this guide.

Supervisor's Responsibilities

During the conference, the supervisor should:

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

Section D - Selecting Optimum Developmental Activities**Introduction**

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

A major difficulty supervisors and employees encounter in matching needs with activities is that of selecting the optimum developmental activity, that is the activity that provides maximum learning within the boundaries of the organization's:

- Mission,
- Budget,
- Workload,
- Travel,
- Staffing and
- Time constraints.

To minimize this problem, a variety of developmental approaches and strategies should be considered. We often think of training only in terms of formal training courses.

Actually 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.

While all four types of experiences have their individual advantages and disadvantages, it is crucial to stress the importance of choosing 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 supervisor may not make this possible. That is why an open discussion between the employee and supervisor concerning all options is necessary to pinpoint what is feasible for approval.

On-the-Job-Training

Structured on-the-job-training is the most frequently used method of individualized learning. In this situation, the employee is counseled and coached while actually performing official duties. It usually involves individual instruction by the supervisor or a designated staff member because of his/her experience in the task or procedure to be learned. This approach can be used to teach employees new procedures, tasks and technology.

Formal Classroom Training

Probably the most common experience is training in the classroom. This training may take place away from your work site. Depending on the objectives, specific program and

instructor's approach, this experience can be very valuable. It may be the only alternative you have to acquire specific or specialized technical or managerial competency. In many instances, however, formal classroom training is not the only way or the best way for an employee to learn. Therefore, it is suggested that no matter what the employee's needs are, consider this experience second to any training the employee can acquire at the work site.

Self-Development

When an employee aspires to a new career and his/her developmental needs cannot be directly related to present or anticipated work assignments, or resources are not available, the employee may undertake self-development activities:

- Taking evening or weekend courses at local schools,
- Watching educational or training videotapes,
- Using correspondence and other self-study courses,
- Reading books and other publications or journals and
- Using PC tutorials or computer assisted training programs.

Remember, what you want in terms of development and what your supervisor can authorize may be different. Your supervisor by law can only authorize certain types of activities on the job. To meet all your goals, it may be necessary for you to gain some competencies on your own time

Developmental Activities

One of the best ways to train for added responsibilities or higher job opportunities is through developmental activities. With the support and assistance of the supervisor, the employee's present job can be restructured or arrangements made to have the employee temporarily transferred to another area to learn firsthand the necessary technical and managerial competencies required for effective performance in that job. Examples of developmental activities include the following list:

- **Shadowing:** Providing a trainee or learner with the opportunity to observe a well qualified, journeyman level employee perform a particular skill. Immediately after the shadowing period, the learner needs to have the opportunity to perform the same skill and be given feedback on that performance.
- **Detail/Rotational Assignments:** Short-term assignment particularly appropriate for important skills that make up a small portion of an individual's job, but can lead to full-time work in that field.
- **Task Force Assignments:** This is particularly effective if the learner has an opportunity to work with well qualified people who will provide feedback to the learner on his/her performance and participation in the group.

Development of Job Aides

Requires that the learner develop a product that will assist in the performance of the job, while, at the same time, serving as a vehicle for learning job-related information.

- Cross-Program Assignments
- Special Work Projects
- Coaching Lower Level Employees

Section E - Preparing The IDP Form

Introduction

The IDP form is simply a means of formally documenting your plan. Once the employee-supervisor conference has been held, the FSA-600 form, Individual Development Plan, may be completed.

Responsibilities

The following table describes the process of completing the IDP form.

Step	Who	Responsibilities
1	Employee	Completes the form.
2	Employee and Supervisor	Discusses and agrees on contents of the form.
3	Supervisor	Ensures that the form is properly

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		completed.
4	Employee and Supervisor	Signs the form.
5	Employee and Supervisor	Keeps a copy of the form.
6	Supervisor	Forwards a copy of the form to the Training Office.
7	Employee	Implements the IDP.

Section F - Implementing The IDP

Employee's Responsibilities

Completion of the IDP form acknowledges the employee's commitment to accomplish the planned training and

development. To implement the plan effectively, three actions are required on the employee's part:

- **Documentation:** Formal training and developmental activities that involve exchange of funds, official time or both must be documented. See Handbook 6-PM, Part 3, Approval and Recording of Training.
- **Participation:** Once the request for training is approved, it is up to the employee to carry through with the experience. The supervisor will support and guide the employee, but the primary responsibility for successfully reaching the goals rests with the employee. It will take time to reach your goals, but the long-term investment will be worth it.
- **Evaluation:** Just taking a course or being involved in a developmental assignment does not necessarily mean the employee has fully met his/her commitment. Training and development needs are identified primarily to enable one to perform with greater ease and efficiency on the job, thus helping the agency accomplish its mission. The crucial step is applying what is learned to the job and practicing it. After each developmental activity, the employee should:
 - Complete the Termination and Evaluation Data section (front and back) on the agency/evaluation copy of the SF-182,
 - Meet and discuss with the supervisor the developmental experience and
 - Return the SF-182 to the Training Office.

Supervisor's Responsibilities

Supervisor should:

- Periodically reassess employee's plan,
- Meet with employee after each training and developmental activity and
- Make periodic written evaluations of how the training and development activities have affected the employee's performance.

Section G - After The IDP Is Completed

What Will Happen to the IDP?

The total of the organization's IDP's will be used to identify the agency's training needs and set its priorities. This process provides the Training Office with a tool to develop total budget data regarding training, as well as scheduling work to accommodate training needs. The IDP also provides the Training Office with some measure of the supervisor's interest in employee development.

Reviewing or Revising an IDP

An IDP is a plan for development, not a contract in stone. IDP's should be reviewed, revised or both as follows:

- at progress reviews of the performance plans,
- upon completion of training and
- altered as performance plans and job assignments change.

