



A GUIDE TO EFFECTIVE INDIVIDUAL DEVELOPMENT PLANS



Individual Development Plans (IDPs) offer an opportunity for managers and staff to work together to encourage growth and advancement of each staff member. These plans are co-written between staff and their supervisors during one-on-one conversations and can lead to engaged staff who feel supported and encouraged by their manager. When IDPs are developed and put into action, staff grow their skills and organizations see engaged, dedicated, and empowered team members.

IDPs may include near-term or long-term goals and can include both personal and professional goals, depending on the organization's overall staff engagement strategy. Goals may include improving a skill set, accomplishing a specific project, leading an initiative, taking on a new responsibility, earning a promotion, etc. The goal of the organization is to support, motivate, retain, and grow your team members.

For these plans to work, the staff member, supervisor, and organization leadership need to be fully committed to the individual development process and the power behind fully supporting the goals and vision of individual team members. An organization that offers IDPs without full support risks disengagement of the team members involved. Rather than a superior-subordinate relationship, IDPs require a supervisor who sees themselves as a coach or mentor.

As such, IDPs must be addressed and reviewed regularly and involve engaged supervisors. Full IDP meetings should happen every six months, while the 2-Minute Check-in can occur anywhere from weekly to monthly. Feedback should be frequent and consistent—not an annual event. Your organization or regulators may have specific annual review requirements. The IDP process can operate in parallel to those requirements and is an enhancement rather than an annual review replacement. The purpose of the IDP is to have regular conversations about expectations, progress, support, growth, and encouragement. Staff who have positive relationships with colleagues and supervisors are more likely to stay.

A few tips for successful review check-ins:

- These discussions are meant to be a coaching experience. Allow the team member to lead the discussion about their goals.
- Supervisor feedback should be timely, specific, balanced, and supportive. IDP conversations are not meant as an opportunity to have a disciplinary discussion; however, don't be afraid to give constructive feedback. Be prepared to accept constructive feedback regarding the support you provide as a supervisor.
- Genuine appreciation and validation are important in these conversations.
- Don't give feedback when you are angry or if you are distracted by other emergencies.
- Truly listen! Positive staff-supervisor relationships make work more enjoyable for everyone (including supervisors and leaders).



GETTING STARTED WITH THE INDIVIDUAL DEVELOPMENT PLAN

It is important that every team member at [organization name] has an opportunity to grow their skill set, advance their career, and accomplish personal and professional goals with our support. To achieve this, we use an Individual Development Plan (IDP) to ensure each team member receives support and encouragement to realize their aspirations for growth.

The IDP is developed between each team member and their supervisor and will be reviewed [weekly/monthly/quarterly] during one-to-one meetings. The goal of this document is to identify near-term and long-term goals for advancement and to strategize steps to help you move toward and accomplish each goal. When completing, consider how you might learn new skills, elevate existing skills, or explore new career pathways that may interest you.

Our vision is that you will:

- Identify personal and professional goals to help you advance in work and life.
- Identify strengths, opportunities, or other areas of focus that you are passionate about advancing.
- Stay connected and engaged with [organization name] as you advance in your career!

Step One: Brainstorming

Yale University developed the Venn diagram below to illustrate the overlap of important criteria to include within your goal settings: competence, organizational need, and passion. Your goals should be selected in a way that advances each of these important areas.

INGREDIENTS FOR PROFESSIONAL DEVELOPMENT



Questions to consider:

1. What aspects of my job do I love most?
2. What talents do I have?
3. What am I passionate about?
4. What am I interested in learning?
5. What makes me feel accomplished or important at work?
6. What would help me feel more competent in my job?
7. Where do I want this job to lead? Do I want to deepen my expertise within this role? Do I want to progress into a new role?



INDIVIDUAL DEVELOPMENT PLAN TEMPLATE

REVIEW						
What accomplishment are you most proud of since your last review?						
Skills Assessment						
Strengths (3-5)	Knowledge Gaps (1-3)	Passions (3-5)	Opportunities (1-3)	Supervisor Input:		
1.	1.	1.	1.			
2.	2.	2.	2.			
3.	3.	3.	3.			
4.		4.				
5.		5.				
NEAR-TERM GOALS (6-12 MONTHS)						
Goal (1-2) <i>What do you want to accomplish or do differently?</i>	Incremental Steps (1-3 steps per goal) <i>What will help you reach your goal? i.e., training, job shadowing, research, special project</i>	What help is needed from supervisor or leadership? <i>What support or permission is needed? What type of assignments, experiences, coaching, or learning do you need?</i>	Are there barriers to your success at home or at work? How might you overcome those challenges? <i>Who can remove the barriers? What support is needed?</i>	Who else might help you achieve this goal? <i>Are there other department leaders, colleagues, or support staff who might assist?</i>	How will you know you've met your goal? <i>What metrics might you track or tangible outcome will prove success?</i>	Target completion date
1.	1. 2. 3.					
2.	1. 2. 3.					

LONG-TERM GOALS (2–5 YEARS)

Goal (1-2) <i>What do you want to accomplish or do differently?</i>	Incremental Steps (1–3 steps per goal) <i>What will help you reach your goal? i.e., training, job shadowing, research, special project</i>	What help is needed from supervisor or leadership? <i>What support or permission is needed? What type of assignments, experiences, coaching, or learning do you need?</i>	Are there barriers to your success at home or at work? How might you overcome those challenges? <i>Who can remove the barriers? What support is needed?</i>	Who else might help you achieve this goal? <i>Are there other department leaders, colleagues, or support staff who might assist?</i>	How will you know you've met your goal? <i>What metrics might you track or tangible outcome will prove success?</i>	Target completion date
1.	1. 2. 3.					
2.	1. 2. 3.					

PERSONAL GOALS

Goal (1-2) <i>What do you want to accomplish outside of work? Consider physical health, mental health, wellness, family, friends, hobbies, etc.</i>	Incremental Steps (1–3 steps per goal) <i>What will help you accomplish this goal?</i>	What support or encouragement is needed from colleagues, your supervisor, or leadership?	Are there barriers to achieving this goal? How might you overcome those challenges?	Who else in your personal life might help you achieve this goal?	How will you know you've met your goal? <i>What metrics might you track or tangible outcome will prove success?</i>	Target completion date
1.	1. 2. 3.					
2.	1. 2. 3.					

Need ideas for professional development activities?

- Attend a training, a conference, or enroll in an online course
- Read a book in a key subject matter area
- Lead or attend a meeting that you don't usually attend
- Participate in or lead a new project to build a specific skill
- Participate in or lead a quality improvement initiative
- Lead or participate in a committee or task force
- Engage with a local or LeadingAge committee or affinity group
- Job shadow, conduct an informational interview, or meet with the CEO
- Assist or job shadow in another department
- Connect with peers in another organization
- Become a peer mentor or a reverse mentor
- Engage with the people you serve or their families in a new or innovative way
- Take on a new responsibility
- Is there a new innovation, regulation, or competency you need to learn to grow in this field?



INDIVIDUAL DEVELOPMENT PLAN MEETING AGENDA/SCRIPT

The full agenda only requires discussion 2 times per year. The 2-Minute Check-in agenda can be used between full IDP meetings.

TEAM MEMBER'S TASKS	MANAGER'S TASKS
<ul style="list-style-type: none">• Complete a draft of the IDP in advance• Review your draft IDP with your manager• Describe what led to your responses• Listen to your manager's input• Finalize your IDP into a document that both you and your manager agree upon• Share feedback on your experience with this meeting• Schedule your next check-in	<ul style="list-style-type: none">• Complete the "Supervisor Input" sections of the IDP• Listen to the staff member's review of their draft IDP and ask questions• Provide input, direction, and support• Share feedback on your experience with this meeting• Review your role in the team member's development (removing barriers, scheduling a training, etc.)• Schedule your next check-in
AGENDA/SCRIPT	
<p>Status Update (Review section of IDP) — Team member leads this section</p> <ul style="list-style-type: none">• What aspects of your job do you enjoy most and what do you enjoy least?• What are your strengths?• What do you need help learning?<ul style="list-style-type: none">» <i>Opportunity for manager to respond</i><ul style="list-style-type: none">> What does the manager see as the team member's strengths and opportunities? <p>Professional Goals Discussion (Near-Term and Long-Term Goals Section of IDP) — Team member leads this section</p> <ul style="list-style-type: none">• Review the following: your goals in your IDP (including the incremental steps), help you need from your supervisor, potential barriers to success, those who may assist in your progress, and the metrics listed.<ul style="list-style-type: none">» <i>Opportunity for manager to respond</i><ul style="list-style-type: none">> How do your team member's goals align with your organization's mission, vision, and strategic plan?> How does their goal impact the people you serve?> What ideas do you have that may assist the team member's development?> What actions will you take to remove identified barriers?> Are there any unrealistic or unattainable components to the IDP that need to be addressed?	

Personal Goals Discussion (Personal Goals Section of IDP) — Team member leads this section

- Review the personal goal you have set for yourself
- Why is this goal important to you?
- How can your supervisor support you in attaining this goal?
 - » *Opportunity for manager to respond*
 - > Offer validation of importance of work-life balance and personal goals
 - > What encouragement can you provide that will support the team member's personal goals?

Review — Team member leads this section

- What actions are you committing to complete before your next check-in?
- What is your supervisor committing to complete before your next check-in?
- Are there any final questions or comments? Are you both clear on next steps?
- Schedule next check-in

Evaluate — Supervisor leads this section

- How did this meeting go?
- Do you have the support you need to move forward?



2-MINUTE CHECK-IN AGENDA/SCRIPT

The 2-Minute Check-in can be used 1–4 times per month depending on need. The purpose is to stay connected and offer continuous support as staff grow in their careers and to build positive relationships.

TEAM MEMBER'S TASKS	MANAGER'S TASKS
<ul style="list-style-type: none">• Review your IDP in advance• Update your supervisor on progress• Listen to your manager's input• Share feedback on your experience with this meeting• Schedule your next 2-Minute Check-in	<ul style="list-style-type: none">• Listen to the staff member's review of their progress and ask questions• Provide input, direction, support, and encouragement• Share feedback on your experience with this meeting• Schedule your next 2-Minute Check-in
AGENDA/SCRIPT	
<p>Status Update on Professional Goals — Team member leads this section</p> <ul style="list-style-type: none">• How are you progressing on your goals?• Do you need any help?• Do your goals need to change?• Are you experiencing any challenges with other colleagues, understanding training materials, or accessing development tools?<ul style="list-style-type: none">» <i>Opportunity for manager to respond</i><ul style="list-style-type: none">> How will you support challenges the team member is experiencing? Provide encouragement or motivation for continued progress. <p>Personal Goals Discussion (Personal Goals Section of IDP) — Team member leads this section</p> <ul style="list-style-type: none">• How are you progressing on your personal goals?• How can your supervisor support you in attaining this goal?<ul style="list-style-type: none">» <i>Opportunity for manager to respond</i><ul style="list-style-type: none">> Offer validation of importance of work-life balance and personal goals> What encouragement can you provide that will support the team member's personal goals? <p>Review — Team member leads this section</p> <ul style="list-style-type: none">• What actions are you committing to complete before your next check-in?• What is your supervisor committing to complete before your next check-in?• Are there any final questions or comments? Are you both clear on next steps?• Schedule next check-in <p>Evaluate — Supervisor leads this section</p> <ul style="list-style-type: none">• How did this meeting go?• Do you have the support you need to move forward?	



SOURCES

Individual Development Plan templates adapted from the following sources:

[Individual Development Planning](#), Yale University, 2022

[Individual Development Plan: Guide to Getting Started](#), Yale University,

[The Individual Development Plan \(IDP\): Chart Your Course](#), University of Nebraska-Lincoln, 2022

[Professional Development Guide](#), University of California San Francisco, 2022

[Employee Career Development Plan](#), SHRM

[Adobe Check-In Toolkit](#), Adobe, 2015

[Use and effectiveness of the Individual Development Plan among postdoctoral researchers: findings from a cross-sectional study](#), National Library of Medicine, 2018, doi: [10.12688/f1000research.15610.2](https://doi.org/10.12688/f1000research.15610.2)

[Personal Development Plans: Insights from a Case Based Approach](#), Greenan, P., Institute of Education Sciences, 2016

[Relevance of Employee Development Plans in Employee Performance Management](#), John, J., Maharishi Arvind Institute of science and management, 2010

[The Future of Employee Development](#), Dachner, A., Ellingson, J., Noe, R., Saxton, B. John Carroll University, 2019
