How to Write an Effective and Achievable IDP:

Developing
Meaningful and Measurable
Objectives and Activities

Shauna Weatherly
GSA FAS PSHC
Center for Charge Card Management
Business Management Specialist
October 2020

How to Write an Effective and Achievable IDP: Developing Meaningful and Measurable Objectives and Activities

Shauna Weatherly, Business Management Specialist
GSA FAS PSHC Center for Charge Card Management
Version Oct 2020

What is an IDP?

OPM.gov, Training & Development:

"An individual development plan (IDP) is a tool to assist employees in achieving their personal and professional development goals. ***IDPs help employees and supervisors set expectations for specific learning objectives and competencies.***

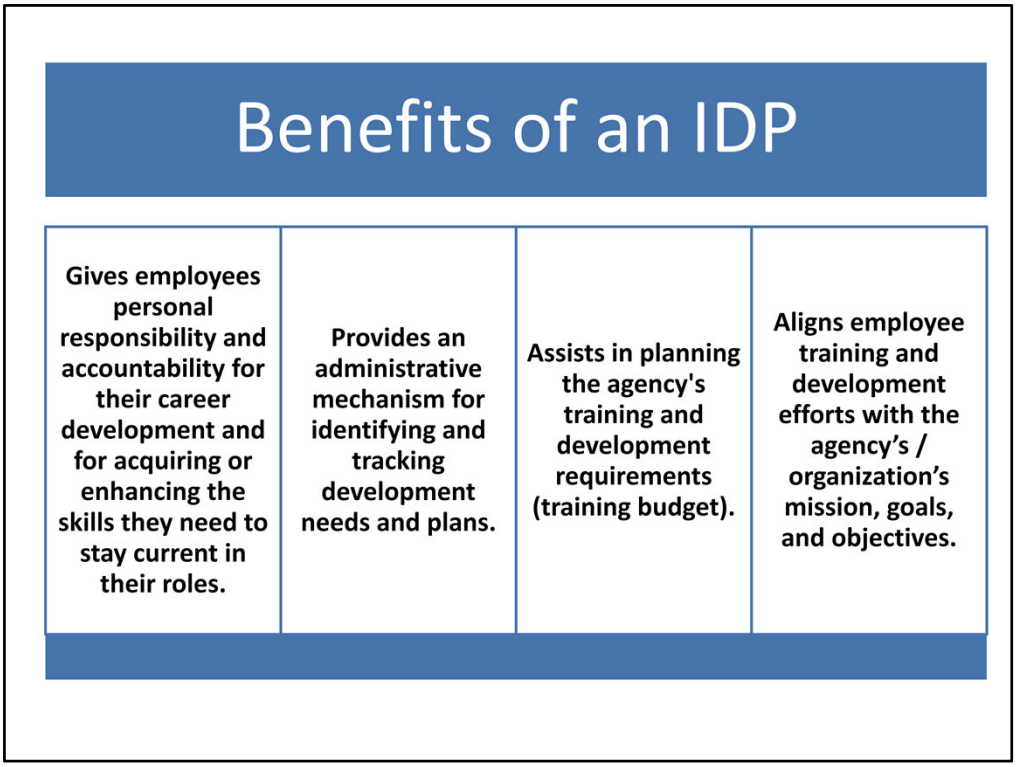
While an IDP is not a performance evaluation tool or a one-time activity, IDPs allow supervisors to clarify performance expectations. ***IDPs should be viewed as a partnership between an employee and their supervisor, and involves preparation and continuous feedback****."*

WHAT IS AN IDP?

Per the Office of Personnel Management (OPM.gov) site for Training and Development Policy WIKI, an IDP is a tool to assist employees in career and personal development. Its primary purpose is to help employees reach short and long-term career goals, as well as improve current job performance. Many agencies require IDPs for new and current employees annually.

I have 33 years of federal service and I've completed at least that many IDPs during that time, sometimes more during development programs. I'm sure most of you have completed IDPs over the years as well. The importance of the IDP in agencies can tend to vary greatly from checking a required box (i.e., "All employees have an IDP") to use of the IDP as a comprehensive tool against which the annual training budget is based or to meet prescribed agency training requirements. Unfortunately, IDPs often end up being an afterthought.

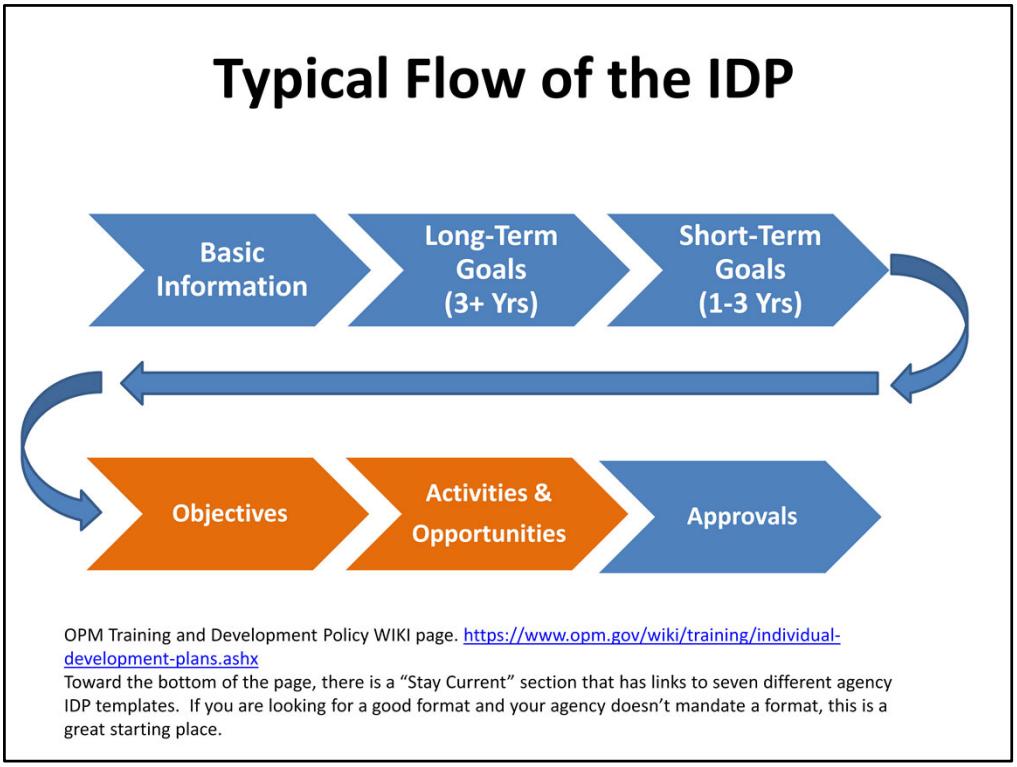
The IDP should:
(a) List specific, measurable objectives for the employee's development, drafted jointly by the supervisor and employee;
(b) Link these development objectives to specific job-related gaps in the employee's skills, knowledge, or abilities;
(c) Explain how the capabilities targeted by the development plan will aid the work unit in achieving its strategic goals;
(d) List individual action items for the employee's learning and development that can be completed within the performance cycle aimed at achieving the stated objectives; and
(e) Identify suitable long-term learning and development goals related to the employee's career development and possible action steps to achieve those goals with a time horizon beyond the performance cycle.



BENEFITS OF AN IDP

Individual development planning benefits the organization by aligning employee training and development efforts with its mission, goals, and objectives. When using an IDP, supervisors develop a better understanding of their employees' professional goals, strengths, and development needs resulting in more realistic staff and development plans. Employees take personal responsibility and accountability for their career development, acquiring or enhancing the skills they need to stay current in required skills.

IDPs provide an administrative mechanism for identifying and tracking development needs and plans. I've used the IDP as a foundation for workforce development programs, building on a skill gap analysis, creating IDPs that fill gaps in necessary skills, and then build my current year training budget and out-year training forecasts / needs. In some agencies, your training budget is going to be fixed or based on a percentage of labor costs. However, if you use the IDP as a building block for your budget and out-year training needs, it can help justify additional training funds or show that maybe you need to simply use the training funds that you already have available in a more efficient manner. This helps supervisors and agencies align employee training and development efforts with its mission, goals, and objectives as well.

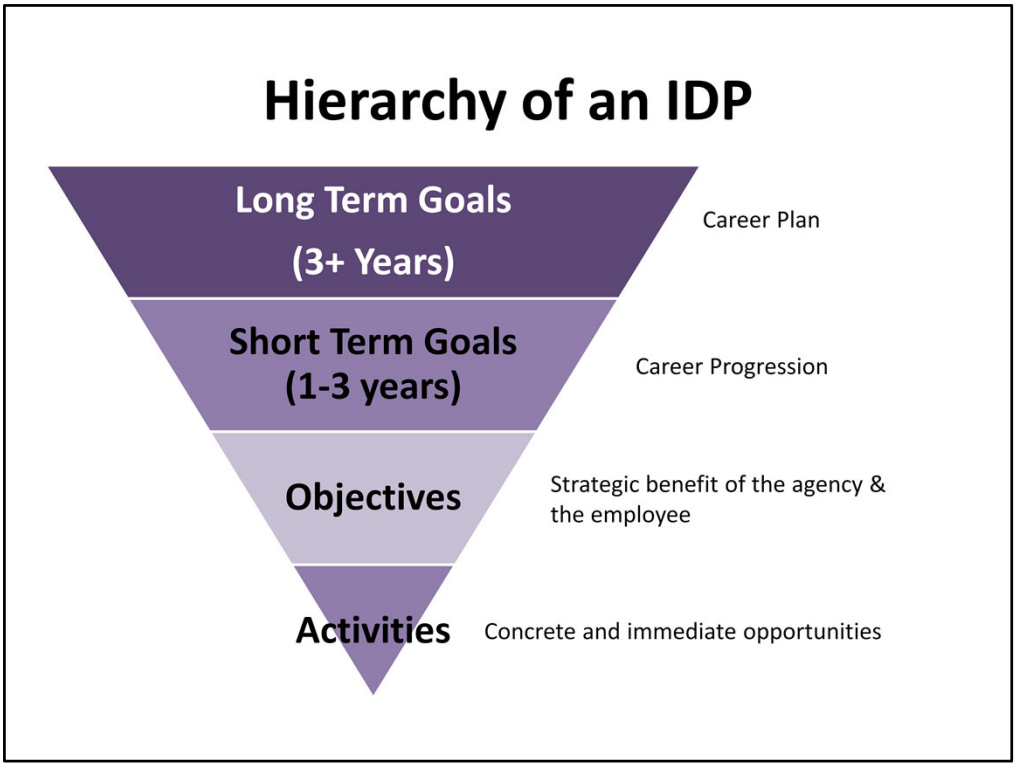


TYPICAL FLOW OF THE IDP

This diagram is the typical flow of the IDP –

- It starts with the basic employee profile and information,
- Next are the employee's career goals – both long and short term,
- Objectives are where the needs of the agency / organization is linked with the employee's development needs,
- Activities & Opportunities are those things the employee will pursue such as classroom or online training, rotational / shadowing / experiential assignments, on-the-job training, self-study programs, or conferences / seminars.
- Lastly, approvals by the supervisor and others, as needed.

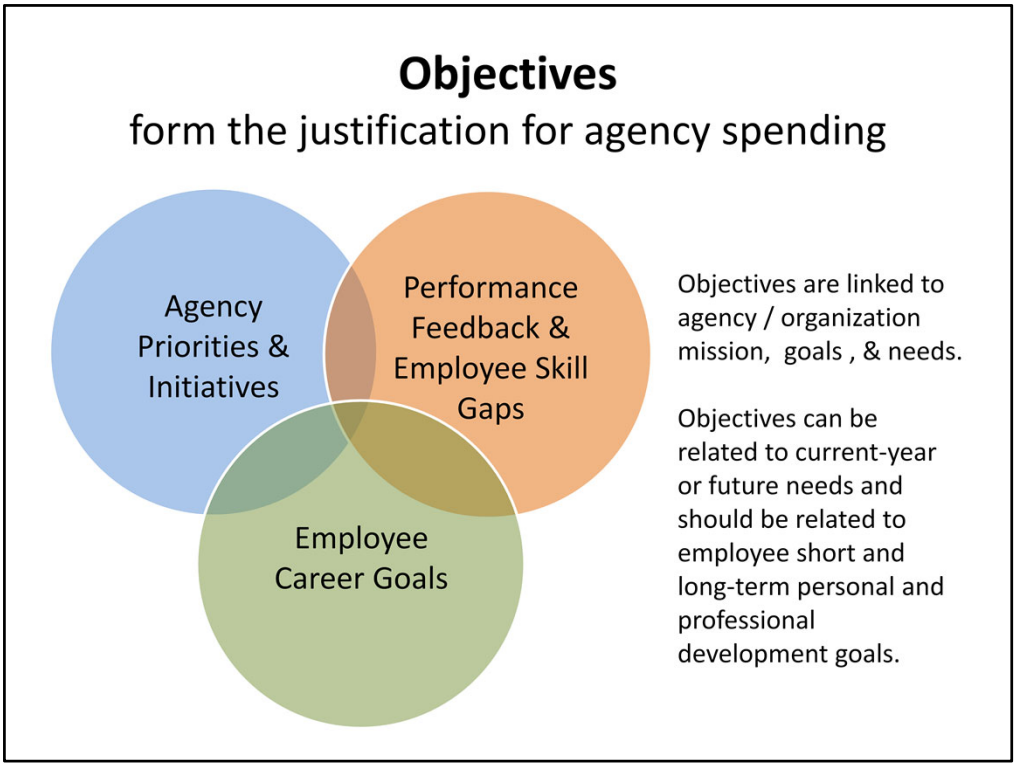
If you search on "OPM" and "IDP" you'll see a link to the OPM Training and Development Policy WIKI page. Toward the bottom of this page, there is a "Stay Current" section that has links to seven different agency IDP templates. If you are looking for a good format and your agency doesn't mandate a format, this is a great starting place.



HIERARCHY OF AN IDP

Or you can think of the IDP flow in an inverted pyramid. Long-term goals (3+ years) comprises the employee's desired plan or path for their career. Short-term goals are the "footsteps" on the path toward completion of the long-term goals. Objectives lay the foundation for each "footstep" that the employee takes on their path and each step should be strategic in the benefit it provides the agency and the employee. Activities are the concrete actions that separately or combined result in the employee's ability to achieve both agency benefit and professional development.

Long-term goals may not change often, but the employee should set short-term goals with the idea that they can be achieved in the course of one to two IDP cycles (1-2 years). Objectives may changes annually as will activities. Objectives and activities not achieved in one year can and should roll over to the following year if they still benefit the agency and link to the employee's goals.

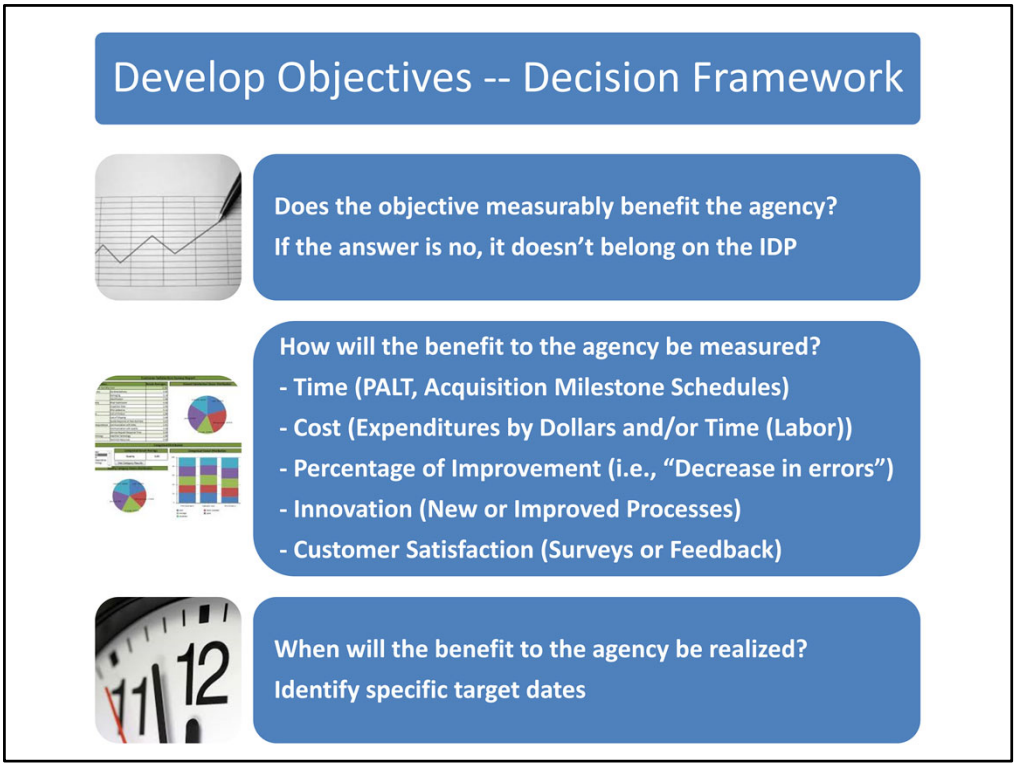


OBJECTIVES FORM THE JUSTIFICATION FOR AGENCY SPENDING

Coming up with objectives should be a partnership between the employee and the supervisor and involves preparation and continuous feedback. Employees typically initiative the IDP process and draft their objectives for input by the supervisor. Objectives should link agency priorities and initiatives, employee career goals – both long and short-term, and may include performance feedback and/or employee skill gaps.

While performance feedback or skill gaps may identify developmental areas for the employee, the IDP is not a performance evaluation tool and should not be used as a formal performance discussion mechanism. However, frank informal discussions about employee performance, strengths, and weaknesses may need to be part of the process in developing meaningful objectives.

Objectives should be written so they are meaningful to the employee's career goals and the agency, attainable, and realistic. Then objectives can be prioritized such that an employee can meet short-term goals within the 1-3 year timeframe, and ideally complete at least one objective annually to maintain a cadence toward goals.



DEVELOP OBJECTIVES – DECISION FRAMEWORK

Objectives don't just appear out of thin air and they have specific things that should be included to make them meaningful and achievable. The framework for a good objective is on this slide. When reviewing an objective you've written for yourself or those of an employee, ask yourself these things --

- Does the objective as written measurably benefit the agency? If the objective only benefits the employee, it doesn't belong in the IDP.
- How will the benefit to the agency be measured? Time? Cost? Improvement or Innovation? Customer Satisfaction? There are others, but at least one measure should be in each objective that explains how the agency realizes the benefit of the time / expense spent for the development effort.
- When will the benefit to the agency be realized? This is where target dates come in to play. When will / must completion occur.

Good Examples of Objectives

"Increase the number of on-time contract closeouts by 50% before 6/30/2021."

"By 9/30/2021, complete a small building maintenance project using sound project management processes, finishing on time and within budget."

"Reduce quality review errors by 10% during FY2021."

If you are stumped, a good place to find meaningful and measurable objectives may be your performance plan

GOOD EXAMPLES OF OBJECTIVES

I've included a few good examples of objectives here.

> "Increase the number of on-time contract closeouts by 50% before 6/30/2021."
> "By 9/30/2021, complete a small building maintenance project using sound project management processes, finishing on time and within budget."
> "Reduce quality review errors by 10% during FY2021."

What do all these objectives have in common? They fit the objectives framework from our previous slide.

It's easy to overthink this and become stumped as to where to begin. A good place is your performance plan. Most of the time the agency performance measures can provide a starting point for at least a few ideas for subject around which to craft objectives. Things like program or project management, quality of work products, agency initiatives or innovation, etc., are found in performance measures and can equate to an objective that benefits with agency while linking it to the employee's own career goals by addition a few additional details.

Using Critical Performance Elements to formulate Objectives

Critical Performance Element	becomes	Objective
Leading People. Working with team members to ensure appropriate project outcomes and successes.	becomes	Increase the number of contract closeouts by 50% before 6/30/2021.
Results Driven. Accomplish assigned tasks and projects on time with successful outcomes that benefit the program.	becomes	Reduce quality review errors by 10% during FY2021.
Business Acumen. Includes, but is not limited to, knowledge of the program, COR duties, project and task management, and training.	becomes	By 9/30/2021, complete a small building maintenance project using sound project management processes, finishing on time and within budget.

USING CRITICAL PERFORMANCE LEMENETS TO FORUMLATE OBJECTIVES

This tables shows how some critical performance elements can become an objective. I've taken a few of my critical performance elements in the past and modified them into a meaningful and achievable objective.

Let's look at the first one – "Leading People. Working with team members to ensure appropriate project outcomes and successes." As an employee or supervisor you probably have tasks within your organization that need more attention. In one contracting shop I worked in contract closeouts had become an afterthought. We included an objective to reprioritize contract closeouts and reduce our backlog over the first three quarters of an FY. Under this objective, employees could then have activities assigned that would achieve this goal like leading the closeout team for a quarter, being a closeout team member, being responsible for collecting and analyzing closeout data, etc. This built the skills of the employee, achieved an objective, set the employee on a path toward a goal they set (e.g., leading a project, experiential assignment, etc.) AND also gave employees opportunities to succeed at a performance element. Win-win!

You can see similar examples in the next performance elements turned objectives.

Bad Examples of Objectives

"Earn a master's degree."

"Finish my FAC-C Level II."

"Learn project management skills."

"Achieve customer satisfaction."

What's Missing?

1. Identifiable benefit to the agency.
2. How the objective will be measured.
3. Timeframe within which the objective must be realized.

BAD EXAMPLES OF OBJECTIVES

You can see examples of "not the best" objectives on this slide. I call these types of objectives "fillers". They are more goals that are used to fill in as objectives. To make these examples meaningful and achievable, there needs to be additional information added. What's missing?

1. Identifiable benefit to the agency.
2. How the objective will be measured.
3. Timeframe within which the objective must be realized.

Let's Switch It Up

Bad Objective	Becomes	Good Objective
Earn a master's degree	Becomes	Complete "Qualitative Analysis" online at Villanova University in order to advance price analysis knowledge for assignment as a price evaluation board member on an upcoming procurement in FY2021.
Finish my FAC-C Level II	becomes	Complete all training and apply for FAC-C II certification level by 9/30/2021 to position my branch for success and meet certification requirements of my position.
Learn project management skills	becomes	Manage a small to medium acquisition project during FY2021, finishing on time resulting in positive customer feedback.
Achieve customer satisfaction	becomes	By 6/30/2021, create and implement a customer survey process and feedback loop, targeting a 50% response rate and achieving no less than a 35% response rate.

LET'S SWITCH IT UP – OBJECTIVES

Taking our bad examples from the previous slide, let's switch it up to become an objective that is meaningful and achievable.

"Earn a master's degree" now establishes an objective that targets a specific skill that benefits the employee and the government, putting the skill to use for an upcoming procurement. By setting this objective we've also found a strategic benefit in linking the employee's goals with the agency's need for resourcing a future procurement.

"Learn project management skills" now establishes the objective in a way that activities can be easily identified to achieve the outcome. This has a strategic benefit in growing the depth and breadth of skills within the organization AND creating a positive customer experience.

Exercise #1

- Using your IDP and/or the worksheet provided, select a current performance objectives and re-write it into a measurable and meaningful objective.

(5 minutes)

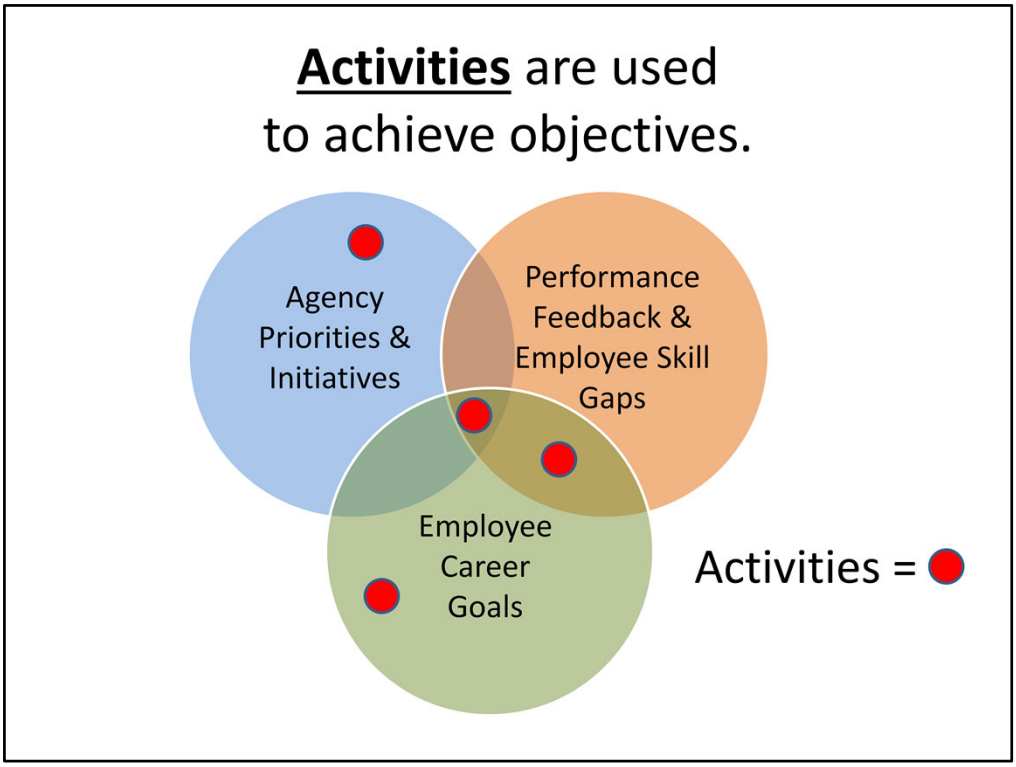
- Difficulties?
- Anyone willing to share their “before” and “after” objectives for feedback?
- Suggestions?

EXERCISE #1

What we do in the workshop version of this presentation is allow participants a chance to use the worksheet provided to re-write an existing objective from their IDP. For the purposes of today we are going to just look at the worksheet provided.

Using your IDP and/or the worksheet provided, select a current performance objectives and re-write it into a measurable and meaningful objective using the frame work and tips we’ve talked about on the previous slides.

- Difficulties?
- Anyone willing to share their “before” and “after” objectives for feedback?
- Suggestions?



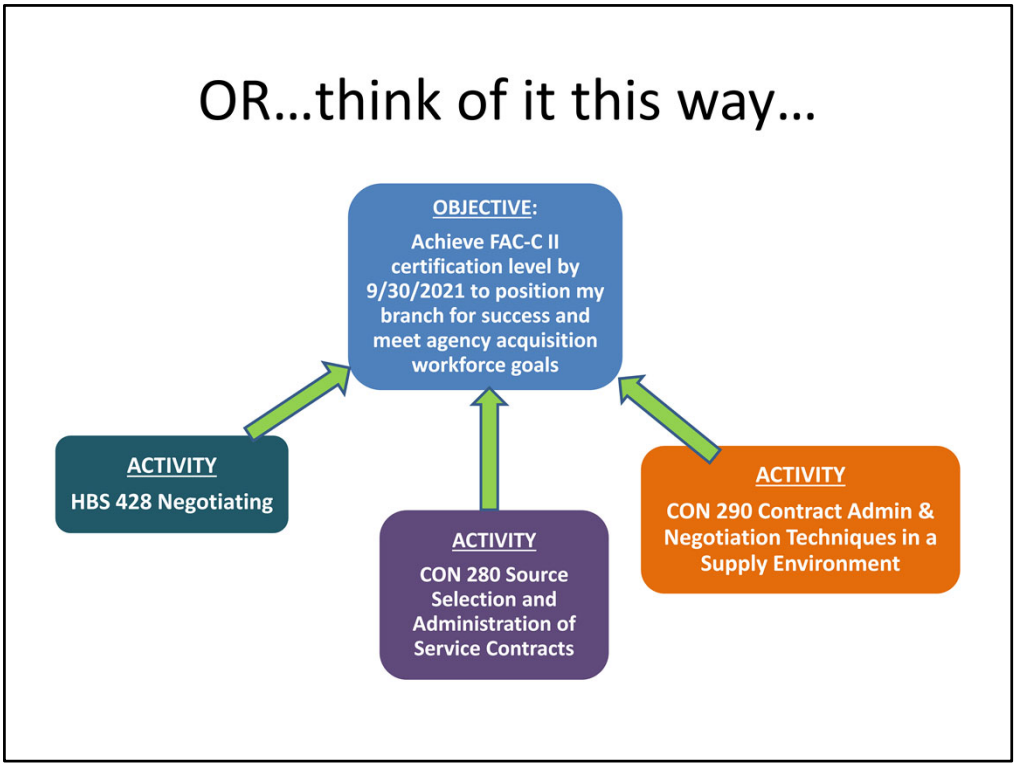
ACTIVITIES ARE USE TO ACHIEVE OBJECTIVES

Looking at our three circles again of agency priorities / initiatives, employee career goals, and performance feedback and employee skills gaps, we want our activities to fit within one or more of these bases of our objectives. It takes work to hit the trifecta and find an activity that links to all three, but that's not required. Balancing the activities is also a good thing so that the employee feels that their goals are acknowledged.

Examples of activities and opportunities that can be utilized are:

- Formal Training - OPM offers formal training at its Management Development Centers and Federal Executive Institute. There are also other formal training centers available to employees across government by a host of agencies. Many have their own training centers or shared training platforms. Formal training can be by the Government or by outside training organizations, institutes of higher learning, or other training academies or centers.
- 360 Degree Feedback - 360 degree feedback is a widely used method and tool to assist in identifying strengths and developmental needs. OPM offers 360 degree survey services as do other organizations
- Mentoring and Coaching - mentoring and coaching are effective tools for personal and leadership development.
- Rotational/Detail Assignments - employees may have the option to participate in details, special/short-term assignments, and projects
- Experiential Assignments – being a speaker at a conference, presenting a training class, and other creative ways to expose employees to challenges or otherwise expand their interests, skills, and capacity to serve.

Activities are what provided the benefit to the agency in the end. If the activity is not successfully completed or not achieveable, the agency will not achieve the benefit desired and outlined in the objective and the employee will not meet their career goals.



OR THINK OF IT THIS WAY

Using achievement of a certification as the objective, activities are the actionable concrete opportunities that lead to completion of the objective. In this case, the three courses lists are required of this employee to complete their certification.

DEVELOP ACTIVITIES – DECISION FRAMEWORK

Activities are sometimes easiest to write because they are the smallest and most actionable items to decide upon. But even activities, as easy as they may be to come up with, have specific things that should be included to make them meaningful and achievable. The framework for a good activity is on this slide. When reviewing an activity, ask yourself these things --

- Does the activity align with the employee's current role / position? Activities should be relevant to the work the employee already does or is expected of the employee in the future.
- What other activities would be as effective but less expensive? With the training budget constraints in some agencies, it is important to think about how to meet an objective. There is almost always more than one way to meet an objective. Encourage your employees and push yourself to think of alternatives to not just the activity but the methods – classes versus detail opportunities, college class versus government class, classroom versus online, etc.
- Is the total request reasonable considering cost, time commitment, and known / planned workload? Be reasonable and realistic. For example, during the busy EOFY crush procurements shops face each year, should training be pushed to earlier in the year to avoid the extensive time commitments known workload brings? The IDP can help have those discussions with employees and explain why and when training should be ideally scheduled and using what method of activity so that mission is not compromised.
- Supervisors only: Is the distribution of training opportunities equitable across all employees in your organization? Some agencies arbitrarily say "only one class per person per year" while others you see people pursuing degrees and others taking a class every few years. Use of the IDP as a planning, approval, and development tracking tool provides visibility into who is getting what training each year and gives you the opportunity for a more equitable distribution of opportunities.

Good Example of an Activity

Training Courses – include exact course title, start / end dates, location, vendor information, contact hours, all costs (to include tuition, travel and per diem, lodging, as applicable) and the specific rationale for why the course meets the objective it is linked to.

Activity Name: FPM 231, Applications in Project Management

Expected Outcome: Will benefit the agency by furthering employee's knowledge of project and program management processes with direct application to her daily work as the COR on the GSA SmartPay 3 Master Contracts.

Cost: $0 tuition costs (FAI); online instructor-led

Comments: Contact hours = 40 hours classroom.

GOOD EXAMPLE OF AN ACTIVITY

I've included an example of an activity here.

Activity Name: FPM 231, Applications in Project Management

Expected Outcome: Will benefit the agency by furthering employee's knowledge of project and program management processes with direct application to her daily work as the COR on the GSA SmartPay 3 Master Contracts.

Cost: $0 tuition costs (FAI); online instructor-led

Comments: Contact hours = 40 hours classroom.

You can see the expected outcome is the benefit to the agency. Classes that are not mandatory for all employees should include statements in the outcomes or justification that clearly document the benefit to the agency and employee.

Again, activities are easier to identify because they are the smallest work piece to meeting an objective. Most often it's a training class or conference but opportunities also fall in this category.

Good Example of an Opportunity

Experiential Assignment – include a title, description of the assignment and how it achieves the associated objective, start / end dates, location, and costs (if any).

Activity Name: Detail to Operational Contracts Branch

Planned Start / End Date: 1 Jun – 31 Aug 2021

Expected Outcomes: Duties will include training on a variety of contract modifications and options, hands-on tasks, and one-on-one feedback loop from a Senior CO. Internal quality control procedures and checklists will be used to measure success and a summary of achievements will be provided to my supervisor to measure progress toward the target of a 10% decrease in quality review errors by 9/30/2021.

GOOD EXAMPLE OF AN OPPORTUNITY

When it comes to writing an experiential assignment or detail as an opportunity, listing the duties and expected outcomes are important because that is how we link the activity to the objective, which in turn support the expenditure by the agency.

In this example, the employee is going on a detail and the duties / experience to be achieved (outcomes) are listed. This also sets the expectation for the employee so the opportunity results in the benefit to the agency and thereby meeting the objective and justifying the expenditure by the agency.

Bad Examples of Activities

"Detail during FY2021."
"Mandatory FAC-C courses."
"Ad-hoc conferences."
"Classes to gain PM skills."

What's Missing?

1. How the activity supports the objective(s).
2. Details, details, details.

BAD EXAMPLES OF ACTIVITIES

You can see examples of "not the best" activities. Again, these are "fillers". To make these examples meaningful and achievable, there needs to be additional information added. What's missing?

1. How the activity supports the objective(s).
2. Details, details, details.

Let's Switch It Up

Bad Activity	Becomes	Good Activity – Expected Outcomes
Detail during FY2021	becomes	Detail to QRBDA 1 Dec – 28 Feb to employee's advance skills in data review and validation to increase timeliness and success responding to customer data requests in FY2021 and beyond.
Mandatory FAC-C courses	becomes	CON 290 Contract Administration and Negotiation Techniques in a Supply Environment. Necessary training to achieve FAC-C II certification level by 9/30/2021 and increase employee skills in contract negotiation and administration, furthering agency acquisition workforce goals.
Ad-hoc conferences	becomes	Attend GSA SmartPay Training Forum in Jul 2021 and complete courses totaling at least 12 CLPs focused on increasing employee's knowledge of uses for the Government Purchase Card which will in turn maximize agency refunds, expand policy knowledge within the work group, and improve customer satisfaction outcomes for FY2021 and beyond.

LET'S SWITCH IT UP – ACTIVITIES

Taking our bad examples from the previous slide, let's switch it up to become an objective that is meaningful and achievable.

"Earn a master's degree" now establishes an objective that targets a specific skill that benefits the employee and the government, putting the skill to use for an upcoming procurement. By setting this objective we've also found a strategic benefit in linking the employee's goals with the agency's need for resourcing a future procurement.

"Learn project management skills" now establishes the objective in a way that activities can be easily identified to achieve the outcome. This has a strategic benefit in growing the depth and breadth of skills within the organization AND creating a positive customer experience.

Exercise #2

- Using your re-written objective, identify at least two (2) activities that support the objective and provide all required information.

(5 minutes)

- Difficulties?
- Anyone willing to share their “before” and “after” objectives for feedback?
- Suggestions?

EXERCISE #2

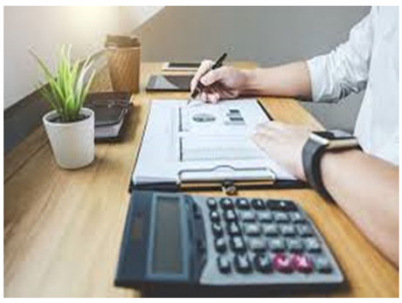
What we do in the workshop version of this presentation is allow participants a chance to use the worksheet provided to come up with an activity that fits under their newly re-written objective. For the purposes of today we are going to just look at the worksheet provided.

Using your IDP and/or the worksheet provided, come up with two activities that support success of your re-written objective.

- Difficulties?
- Anyone willing to share their “before” and “after” objectives for feedback?
- Suggestions?

It's called a PLAN for a reason

- **Be realistic and flexible.**
- **Draft objectives early and discuss**
- **Identify more than one activity that could satisfy the objective(s) -- provide alternatives that fit different funding scenarios (e.g., webinar vs TDY).**
- **Use the IDP process to build strategic resourcing & planning.**
- **Track progress.**
- **Use the IDP as a talking tool at regular intervals.**



IT'S CALLED A PLAN FOR A REASON

- Be realistic and flexible. Understand potential budget constraints or shifting management priorities.
- Draft objectives early and discuss / rework them with your supervisor.
- Align both personal and organizational goals to objectives and activities proposed.
- Map activities; identify more than one activity that could satisfy the objective(s) -- provide alternatives that fit different funding scenarios (e.g., webinar vs TDY).
- Track progress using specific measures from objectives and activities.
- Use the IDP as a talking tool at regular intervals with your supervisor / employee (required at mid-point / end of year performance reviews).