



## INDIVIDUAL DEVELOPMENT PLAN (IDP) JOB AID

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### Overview

The Individual Development Plan is a valuable career development tool. The following user guide is designed to acquaint you with the purpose, goals, and process of an IDP.

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### Purpose

An IDP is a tool to help members plan for and achieve professional, personal, educational, and financial goals. It is a developmental "action" plan to move the member/employee from where they are to where they want to go.

The most common objectives for having an IDP are to:

- Develop a plan for next promotion, advancement or step increase.
  - Develop a plan to receive desired next assignment.
  - Develop a plan to achieve professional, personal, physical fitness, education, or financial goals.
  - Improve communication and transparency with mentor and/or supervisor.
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### Goals

An IDP is:

- A developmental partnership between a member/employee and supervisor and between a member/employee and their mentor. IDP preparation involves member reflection and self-awareness and IDP counseling involves deliberate feedback, clarification, and discussion about developmental needs, goals, and plans. Supervisor-Subordinate and Mentor-Mentee communication is key to the success of the IDP process.
- A vehicle to address the needs of the member and the needs of the organization. The mutual interests and concerns of the member and the organization must be considered in the IDP process. The IDP process can assist the member in meeting both personal and organizational goals for success.
- An active and ongoing process. An IDP is a living process that encourages individual empowerment and growth.

An IDP is not:

- A one-time activity.

## INDIVIDUAL DEVELOPMENT PLAN (IDP) JOB AID, Continued

**Goals,  
cont'd**

- A performance appraisal. The IDP should not be used as a means to formally assess the member's performance and should not be used for human resources decisions (e.g., promotions, etc.). It does not replace the performance evaluation form/system to determine advancements, promotion, pay, awards, etc. The purpose is professional development, not appraisal. *A person's decision not to carry out a developmental activity or achieve a goal should not impact his or her performance evaluation. Correct use of an IDP, however, will likely improve a member's performance and behaviors.*
- A guarantee of promotion to a higher paygrade. An IDP can help prepare a person to become qualified for a higher paygrade, but does not imply a guarantee of promotion.
- A fix for all supervisor-personnel relations problems. The IDP is only one part of the comprehensive efforts of an organization to enhance job satisfaction and cooperative work relationships.

**Process**

**IDP Process:**

Step #	Description
1	Conduct a self-assessment
2	Set up a meeting with your mentor
3	Set up a meeting with your supervisor *
4	Fill out the IDP Form
5	Meet with your mentor
6	Meet with your supervisor *
7	Finalization of IDP Form *
8	Implementation
9	Follow-Up
10	Next Meeting

\* These steps are not required when this for is used independent of first-termer requirements.

**Step One: Conduct a self-assessment**

To conduct a self-assessment, start by thinking about your current state (i.e., your current rating/rank, your current job, your current qualifications and competencies, your current physical fitness level, your current financial situation, your current education, and your current personal situation) your current your knowledge, skills, and abilities.

Then, think about where you want to be in 12 months (i.e., the next advancement/ promotion, your next desired job assignment, your

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### Process, cont'd

physical fitness goals, your education goals, your financial goals, other goals).

Then, think about how you can get there. Ask yourself:

- What steps do I need to take to accomplish each goal?
- What barriers or obstacles might prevent me from accomplishing my goals (e.g., time, money, other commitments, etc.)?
- What can I do to overcome these barriers or obstacles?
- What resources are available to help me?

Keep in mind that you will likely need guidance and mentorship to reach these goals, which is one of the purposes of the IDP. Your mentor and/or supervisor will be able to either directly help you by providing guidance on how to achieve your goal or indirectly help you by directing you to the appropriate resource or subject matter expert.

Then, repeat the process for where you want to be in 2-5 years.

### Step Two: Set up a meeting with your mentor (optional)

Set up a meeting with your mentor, if you have one. If you do not have one and desire one, ask for one through your chain of command or use your own resources to identify and select one. Your mentor should be a person that you feel comfortable sharing your personal and professional goals with and a person who has enough experience to assist you in achieving your goals.

When setting up the meeting with your mentor, ask if he/she would prefer you to fill out the form beforehand.

### Step Three: Set up a meeting with your supervisor (optional if IDP is not required)

First term military members are required to review the IDP with their supervisor. For others using an IDP this step can be very beneficial but is not required. When setting up the meeting with your supervisor, ask if he/she would prefer you to fill out the form beforehand. Some supervisors may want to fill out the form with the member/employee, regardless of rank, rank or experience.

Establish whether your mentor will accompany you in the meeting with the supervisor.

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### Process, cont'd

#### Step Four: Fill out the IDP Form

Based on your supervisor's and mentor's requests from Step Two and Three, begin filling out the IDP form or at least as much as you can. Use CGBI and Direct Access to obtain your personal information:

- Direct Access User Guides: <https://www.dcms.uscg.mil/ppc/pd/da/>
- CGBI User Guide:  
[https://cgbi.osc.uscg.mil/analyze/CGBIHelp/CGBI\\_Help.htm](https://cgbi.osc.uscg.mil/analyze/CGBIHelp/CGBI_Help.htm)

The discussion topics within the "Advancement/Promotion", "Career Planning", "Education", "Financial Planning" and "Additional Discussion Points" sections are suggestions. As labeled, they are "Proposed Discussion Points" that provide the supervisor and/or mentor with a baseline for generating a developmental conversation. They are not all inclusive and may not all apply based on your needs.

### SMART Goals

When developing your personal and professional goals on Page 2, use the SMART acronym. Your goals should be:

**S**pecific, **M**easurable, **A**ttainable, **R**elevant, **T**ime-Bound

#### **S**pecific:

A specific goal has a much greater chance of being accomplished than a general goal. To set a specific goal, you must answer the six "W" questions.

- **What:** What do you want to accomplish?
- **Why:** Specific reason, purpose or benefit
- **Who:** Who will be involved?
- **Where:** Identify a location
- **Which:** Identify requirements or constraints.

**Example of specific:** Complete all the requirements for advancement to E-4.

**Example of non-specific:** Advance to the next rank.

#### **M**easurable:

Next - requires establishing a set criteria for measuring progress towards attaining your goal. In other words, comparing where you are now to where you want to be. How will you know when you have accomplished your goal? This will help keep you on track and let you know if you are falling behind.

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**Process, cont'd**      **Example of measurable:** Complete Project Manager Level 1 certification.  
**Example of non-specific:** Get an initial acquisition certification.

**SMART Goals, cont'd**      **A**ttainable:  
Another important component of goal setting is making sure your goal is attainable. The best goals should challenge you, but should not be impossible to achieve. Do you possess:

- The right Attitude, how committed are you?
- Do you possess the aptitude and capacity to accomplish this goal?
- What talent or expertise will be needed to ensure your success?
- Do you have the financial means to achieve your desired outcome?

**Example of attainable:** Having just reached my 6 months (time in grade) as an E-3 complete all the requirements for advancement to E-4.

**Example of non-attainable:** Having just graduated boot camp, advance to E-6.

**R**elevant:

Is your goal practical? Is the goal relevant to your life? Does it meet your priorities? Remember, expending time, energy, and money on a goal that will not serve you, does not make sense.

**Example of realistic/relevant goal:** Having just received high marks and a ready for advancement recommendation on my EER, advance to E-4.

**Example of not realistic/relevant:** As a seaman in Deck Department, qualify as an EOW.

**T**ime-Bound:

Finally, you need to develop a specific time-frame to achieve your goal. A time-frame will get you started. Your time-frame must be reasonable, and it must take into account factors that are outside of your control.

**Example of time-bound:** I will complete the requirements for advancement to E-4 within 6 months.

**Example without time-bound:** I will complete the requirements for advancement to E-4.

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Process,  
cont'd

### SMART GOAL:

<b><u>S</u>pecific</b>	Complete all the requirements for advancement to E-4 IAW COMDTINST M1000.2A.
<b><u>M</u>easurable</b>	By using the E-4 advancement checklist, ensure all tasks completed.
<b><u>A</u>chievable</b>	Having just reached my 6 months (time in grade) as an E-3, complete all the requirements for advancement to E-4
<b><u>R</u>elevant</b>	Having just received high marks and a ready for advancement recommendation on my EES, advance to E-4.
<b><u>T</u>ime-Bound</b>	I will complete the requirements for advancement to E-4 within 6 months.

**Having just reached my 6 month time in grade mark as an E-3, and having just received high marks and a ready for advancement recommendation on my EER, I want to complete all the requirements for advancement to E-4 IAW COMDTINST M1000.2A within 6 months.**

#### Step Five: Meet with your mentor

If pre-established, meet with your mentor and review the IDP form.

The mentor should review the form and its contents with the mentee. If the mentee needs help in filling out the form the mentor will assist. Additionally, the mentor will provide developmental feedback to the member and may prepare the mentee for the meeting with the supervisor.

#### Step Six: Meet with your supervisor (required for first termers)

The objectives of the mentor and mentee meeting are for the mentor to provide feedback to the mentee and for the mentor and mentee to obtain mutual commitment and align expectations on the IDP.

#### *Mentee's Responsibilities:*

- If pre-established, ensure the form is filled out as sufficiently and accurately as possible
- Provide the form, electronically, to the supervisor prior to the meeting and bring a copy to the meeting.

## INDIVIDUAL DEVELOPMENT PLAN (IDP) JOB AID, Continued

### Process, cont'd

#### *Supervisor's Responsibilities:*

- Review the member's form before the meeting, if pre-established requirement for member to complete.
- Be aware of advancement, promotion, or step level increase procedures.
- Be aware of various Work-life resources; local and through CGSUPRT.
- Be aware of professional development resources available; local and through CG training system.
- Be aware of organizational trends and/or planned changes that will require the member to develop new skills or enhance current skills to achieve desired goals or desired next assignment.

#### Note to the Supervisor:

The discussion topics within the "Advancement/Promotion", "Career Planning", "Education", "Financial Planning" and "Additional Discussion Points" sections are suggestions. As labeled, they are "Proposed Discussion Points" that provide you with a baseline for generating a developmental conversation. They are not all inclusive and may not all apply. As the supervisor, you will need to personalize the conversation and ensure that the specific needs of the member are met.

#### Step Seven: Finalization of IDP Form (For first termers)

Immediately following the meeting, the supervisor will complete and sign the form based on the conversation and will send to the member and mentor (if applicable) for signature before sending to the CO/XO (as designated at the unit) and the unit training representative responsible for documenting IDPs.

#### Step Eight: Implementation

Implement your plan.

#### Step Nine: Follow-Up

Continuously update your IDP and follow-up with your supervisor and/or mentor.

#### Step Ten: Next Meeting

Schedule the next counseling session based on your rate's EER cycle (i.e., E-3 = every 6 months, E-7 = every 12 months, O-1 = every 6 months, O-4 = every 12 months, civilians = every 12 months)