

Individual Development Plan Template

Goal

This tool helps you work with individual staff members to outline a plan for their continued growth and development. Building a development plan with staff shows them you're invested in their career and encourages staff to feel a sense of ownership for their own growth.

Manager Time Commitment

To implement: 45 minutes per staff member
To review progress and update plan: 30 minutes periodically (at least once per year) per staff member

Staff Time Commitment

To complete Individual Development Plan: 45 minutes
To review progress and update plan: 30 minutes periodically (at least once per year)

How to Use This Tool

1. Select staff members to complete an Individual Development Plan (IDP).

There are two schools of thought regarding who should complete an IDP:

1. One philosophy is every staff member should have an IDP to focus their (and their manager's) efforts on specific development objectives.
2. Another philosophy is managers should reserve IDPs for staff who have a demonstrated interest in self-development.

If you have five or fewer direct reports, we recommend completing an IDP with every staff member.

If you have more than five direct reports, we recommend prioritizing IDPs for staff who have at least six months of tenure and meet at least one of the following criteria:

- Staff who have expressed interest in growing
- Top-performing staff who have high potential to advance
- Top-performing staff who are a retention risk

2. Schedule a 45-minute check-in with individual staff members to develop an IDP.

In the meeting invitation, let the staff member know:

- You'd like to use the time to discuss what the staff member enjoys about their current role and skills they'd like to further develop
- There's no need to prepare anything formally in advance, but you'd like them to come with thoughts about specific strengths they'd like to use more often or skills they'd like to develop
- The location (ideally, a quiet place)

3. Complete the IDP template together during the one-on-one meeting.

Start the meeting by reiterating the purpose of the conversation: it's a chance to discuss what the staff member enjoys about their current role (and would like to spend more time on) and skills they'd like to further develop.

Explain that an IDP can help both the staff member and you as their manager track progress against the staff member's goals.

Discuss the different components to the IDP (see the IDP template on page 51) and work together to fill out each section.

Personal Development Objective: This is the goal(s) that the staff member wants to achieve.

To identify potential development objectives, ask the staff member:

- What do you enjoy most about your job today? Are there strengths you'd like to spend time further developing?
- Are there specific skills you'd like to develop that would make your current job easier?
- Are there specific skills you'd like to develop to prepare for a future role?

Also think about the individual's performance evaluation and common feedback from peers or others: What strengths does this staff member have? What areas can they further develop?

Examples of personal development objectives:

- Deepen understanding of the health care business
- Improve presentation skills
- Mentor less-experienced staff

Actions: These are the specific actions the staff member will take to reach their development objectives.

The more specific the action step, the better! For example:

Too General	Specific Enough to Be Actionable
Lead a project	Serve as team leader on the taskforce looking at causes of turnover in the department
Improve critical thinking	Identify an improvement opportunity on the unit and conduct a root cause analysis to understand what's driving the problem
Communicate better	Share update on sepsis project at team meeting and ask for presentation feedback from my manager

For a list of actions to use as a starting point, review the Stretch Opportunities Picklist on page 52.

Timeline: Give each action a deadline. You can use specific dates (e.g., July 30) or more general milestones (e.g., “Complete by end of the second quarter” or “Before the end of the year”).

Resources/Support: Identify tools, trainings, or people who can help the staff member achieve their objective.

Metrics: For each of the action items, identify a way you can measure when the staff member has completed it. You might use a process-based metric (for example, completing a training class, or successfully leading two meetings) or an outcomes-based metric (for example, earning a specific score on a competency test).

4. Hold periodic check-ins with staff members to revisit and update IDPs.

Ideally, you should meet with staff to discuss progress on their IDP once a quarter or once every six months. You can set aside a few minutes at the end of a regular check-in to discuss the IDP.

At a minimum, meet with each staff member once per year to discuss progress and update the IDP.

When you check in with staff, ask if they have the resources and support they need to achieve their development goals. If not, what are the barriers? How can you solve or work around them?

Review the objectives and actions to see if any need to be changed to reflect new priorities or opportunities.

Personal Development Objective What are the two or three development objectives you want to focus on across the year.	Actions For each development objective, what specific actions can you take that will help you achieve your goal?	Timelines Establish realistic deadlines for completing each action item.	Resources/Support Identify any tools, trainings, individuals, or information that will help you achieve your objective.	Metrics For each of the actions you've outlined, identify measurable outcomes to assess progress towards the development objective.
Improve presentation skills	<ol style="list-style-type: none"> 1. Research the impact of consumerism on the health care industry and share my findings at an upcoming team meeting 2. Shadow my manager's upcoming presentation to the senior leadership team 3. Participate in the next communication class offered 	<ol style="list-style-type: none"> 1. March 2. April 3. By October 	<ol style="list-style-type: none"> 1. Practice session with manager 2. Debrief with manager after her presentation 3. List of upcoming training 	<ol style="list-style-type: none"> 1. Present to team at March meeting 2. Attend presentation and discuss what I learned with manager 3. Attend training and discuss what I learned with manager