

# **INDIVIDUAL DEVELOPMENT PLANNING (IDP)**

**Prepared for  
Human Resources Development Specialists  
(HRDS)**



**NATIONAL GUARD BUREAU**



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*People First, Mission Always*

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## INDIVIDUAL DEVELOPMENT PLANNING

### **INTRODUCTION**

Career issues cover a broad spectrum, ranging from getting up to speed in a new job to making a major career field change or planning your retirement. Individual Development Planning (IDP) is a process for identifying work experience, training and other activities that contribute to improved job performance and self development. This deliberate planning process provides a good framework for development discussions between employee and supervisor. It involves a joint effort between supervisor and employee in assessing the employee's skills and expertise in relation to current or future job requirements and then identifying appropriate training and other developmental experiences. Engaging in the IDP process also provides the supervisor with a valuable tool for refocusing the workforce to meet present or future organizational requirements.

At the same time, employees have a focused career development plan and get to take responsibility for their own career management. Employees should focus, in drafting the initial plan, on development activities that would improve current work performance and prepare them for possible new duties. The supervisor participating in the IDP process, should focus on current and changing job requirements, the changing needs of the organization and the assessed strengths and growth needs of the employee. In essence, the IDP process gives the supervisor/employee team an opportunity to develop a strategy for achieving both organizational and personal developmental goals. As such, each IDP is uniquely tailored to the needs of the individual and the organization.

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### **RESPONSIBILITIES**

#### **SUPERVISOR**

Supervisors and employees must work together to develop realistic plans for career development. The supervisor has a systematic tool for ensuring that the employee gets the education and training that meets the employee's developmental needs and organizational goals. The ideal individual development plan should be realistic enough to provide employees with opportunities to advance to their highest levels of their abilities. After the development of the initial individual plan, whether the duration is for two years or five, the supervisor should schedule periodic career counseling sessions with the employee. These sessions should include identifying the training requirements; work out a training schedule to meet the requirements; and plans to provide the employee with on-the-job training experiences, using real work situations and operating problems. The supervisor should also incorporate the IDP review and update into the regular performance appraisal cycle when setting and evaluating performance goals, objectives, and standards for the coming year.

#### **SUPERVISOR'S ROLE**

Your supervisor is in a "key" position to help and support your development by:

- ✓ Giving you feedback on your performance in your current job and identifying your strengths and areas for improvement.
- ✓ Helping you to assess your advancement potential and qualifications for other more challenging positions.
- ✓ Providing and funding training opportunities if mission related (National Guard) and funds are available, and also supporting your training and development activities.
- ✓ Acting as a resource and referral for exploring your career development options.
- ✓ Acting as a mentor and coach.

#### **EMPLOYEE**

You, the employee, are responsible for initiating the IDP process for your career progression and personal development. You are expected to take charge of your own learning and development and actively participate in planning goals for the next one to three years and how you will meet them.

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### **EMPLOYEE'S ROLE**

- ✓ Assessing your existing skills, competencies, and interests by using any reliable 360-degree assessment tool that will give you the perspective from peers and customers, supervisor, and HR support staff.
- ✓ Setting goals and objectives that will enhance your career as well as benefit the organization.
- ✓ Draft the IDP

### **THE IDP PROCESS**

#### **PLANNING AND PREPARATION**

The employee and the supervisor prepare the groundwork for a realistic and worthwhile IDP by beginning with the fundamental planning and preparation. A good time to start the planning and preparation for the IDP process is while the employee is starting the new performance cycle. The supervisor should:

- ✓ Begin by explaining the IDP process to the employee, employee's role, and the supervisor's role.
- ✓ Review and discuss with the employee his or her strengths and weaknesses in performing the current work assignment.
- ✓ Identify any specific gaps between the employee's current competencies and those required to perform in the current work assignments or the performance plan.
  - Identify the training and education activities that will address these gaps.
  - Establish a schedule of the activities in priority order.
- ✓ Include options for learning to accomplish the expected outcomes such as
  - Formal training
  - On-the-job training or coaching by the supervisor or another expert worker.
  - Add new work or increase the employee's level of responsibility through job enrichment.
  - Provide employee with developmental assignments or details to other parts of the organization.
- ✓ Provide information on career planning and counseling resources, only if the employee requests these services.
- ✓ Give the employee a copy of the IDP form and instructions for completing it.
- ✓ Help the employee set a deadline for completing the draft IDP.

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### DRAFTING THE IDP

The next step in the IDP process, the employee should be able to draft the IDP with advice and guidance from the supervisor. The supervisor should draft that portion of the IDP pertaining to the competencies the employee needs to perform in the current job for the upcoming performance cycle. The supervisor also has an obligation to secure the necessary resources for these required developmental activities. The employee should draft the portion of the IDP for personal and career goals. The organization is permitted but not required to secure the resources for these developmental assignments. The employee should:

- ✓ Assess his or her existing competencies and interests
- ✓ Identify KSAs or competencies for personal growth and career enhancement that the employee plans to develop in the upcoming performance cycle.
- ✓ Research and identify proposed learning experiences that address the desired KSAs or competencies.
- ✓ Draft an IDP proposing and scheduling the designated learning activities.

The supervisor should review the employee's draft IDP and make sure:

- ✓ The learning activities the employee has outlined are realistic, considering the organization's needs, budget and human resources.
- ✓ The learning activities are the best possible options for the employee's learning needs.
- ✓ Learning activities the employee has identified and the schedule for each should allow the employee to continue to satisfactorily carry and perform a fair share of the workload.
- ✓ And, that the learning activities identified in the IDP are possible and actually available as scheduled.

### PREPARING THE FINAL IDP

The supervisor and employee work together to make the final document is practical, useful and of benefit to the employee, as well as the organization. Therefore, to finalize the document, the employee and supervisor take the following steps:

- ✓ Meet to discuss the draft IDP and come to an agreement on the employee's needs, learning experiences and schedule of activities that will be included in the final document.
- ✓ Establish an agreeable date when the employee will have the final IDP completed.
- ✓ Supervisor review (for any required changes) and approve the IDP..
- ✓ Supervisor submits completed and approved IDP to NGB by established suspense date for review and approval before it becomes the official document for the employee.

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- ✓ Schedule periodic meetings together for the purpose of checking progress on completing the activities as written in the IDP

The supervisor should use the information on the IDPs for his or her staff members to respond to the call for training requirements from NGB.

### **FOLLOW-UP ACTIONS**

Reviews of the IDP and counseling sessions should be incorporated into the regular performance appraisal cycle during that time when supervisor, along with the employee, is setting performance goals, objectives, and evaluating standards. Together, supervisor and employee should review the IDP no less than twice yearly to provide close continuity with the budget process and allow for revisions and re-development of the schedule of plans based on changing mission, technology and personal career goals. Supervisors and employees must ensure that each incident of training and education for the employee is documented in the DCPDS, training and education history update. Again, as the year moves along, it is important that supervisors and employees stay alert for changes in the work, resources, technology, or the work environment that would make it necessary to adjust the plans in the IDPs.

The IDP is a personal action plan, jointly agreed to by employee and supervisor. It identifies the employee's short and long-term career goals. A realistic and useful IDP also identifies the training and other developmental experiences needed to achieve those goals, for the benefit of the individual and the National Guard, within a specified time frame.

### **STANDARDIZED HRDS COURSE REQUIREMENTS**

It is a supervisory responsibility to see that every new technician has a systematic plan for training and development – the Individual Development Plan, IDP. The NGB has the following courses as standard requirements for every Human Resources Development Specialist (HRDS), usually referred to as Employee Development Specialist (EDS). These courses will be included on the IDP for every HRDS, regardless of the employee's career goals and aspirations. They have been determined as beneficial to both the employee in the Human Resources Development arena for workplace performance and learning improvement and the organization.

#### **Training**

- ✓ **Budget** – Including Formulation and Execution. Clear up the confusion of the budget process. Learn how to develop an operating budget for a field-level activity or organizational unit.

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- ✓ **Fiscal Law** – “Government Contract Law,” discover the unique laws of federal contracts that are derived from statute, regulation and the decisions of administrative and judicial forums. Learn how contract laws can be expected to be applied to common contracting situations. “Contracting Basics for Administrative Personnel,” contribute to your organization’s contracting success by learning the fundamentals of government contracting, from translating complex terminology and defining acquisition process to recognizing potential conflicts of interest and interpreting key provisions of the Federal Acquisition Regulation (FAR).
- ✓ **Facilitator Course** - know what really happens in the classroom. Develop your own style of facilitation by learning group dynamics and strategic management of decision making and problem solving.
- ✓ **Presentation Skills/Briefing Techniques** – Learn to overcome your fear of public speaking. Discover strategies to develop and organize your thoughts, learn to speak directly to the audience, field tough questions and get the most from visual aids.
- ✓ **DCPDS** – Defense Civilian Personnel Data System. Learn the technical sides for system required data input.
- ✓ **Instructor’s Course** – Improve your instructional skills and become a more polished presenter. You discover proven training techniques for large and small groups, including a variety of instructional methods from presentation and demonstration to role and game playing.
- ✓ **Technician Personnel Management Course (TPMC)** – Learn the current policies and procedures that govern every facet of human resources management for the National Guard. (Also, mandatory training for supervisory personnel.)
- ✓ **Communication Skills** – Learn the basics of effective communications to help you deliver superior customer service by successfully interacting with internal and external customers. Develop flexibility when handling requests and complaints and spot and respond to important verbal and nonverbal messages.

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### **THE IDP FORM**

COMMENTS: Included here is a sample IDP form. Any format you decide to use is acceptable, as long as it contains the basic components of the IDP. It should have the long and short term goals, and a planned schedule of learning activities to obtain those goals. The overall duration of the IDP should be no less than two years but not more than five years. A fundamental guide to follow when developing your IDP is the SMART Goal Setting Principle:

“Look at each goal and **evaluate** it. Make any changes necessary to ensure it meets the criteria for SMART goals”:

**S** = Specific

**M** = Measurable

**A** = Attainable

**R** = Realistic

**T** = Timely

Please see detailed guidance for following the SMART goals at Appendix B of this document.

## Individual Development Plan

<b>1. Name</b>		<b>Dates of IDP</b>	
<b>Position</b>	<b>Grade</b>	<b>From</b>	
<b>Organization location</b>		<b>To</b>	
<b>Short-term goal</b>		<b>Employee (signature)</b>	<b>Date</b>
<b>Long-term goal</b>		<b>Manager (signature)</b>	<b>Date</b>

**2. Experience, training and education which contribute to goal(s)**

3. Objective/Goals (skill, knowledge, or experience I wish to update)	4. Developmental Activities	5. On Clock Staff Hours and/or amount of Training Funds Required	6. Dates	
			Target	Completed

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3. Objective/Goals (skill, knowledge, or experience I wish to update)	4. Developmental Activities	5. On Clock Staff Hours and/or amount of Training Funds Required	6. Dates	
			Target	Completed

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**Individual Development Plan (IDP) Process**

**Employee's Action**

**Supervisor's Action**

**Joint Action**

• **Assessment**

- Strengths and weaknesses of present job
- Long-range goals
- Strengths and weaknesses compared to qualifications and skills of target
- Drafting of IDP
- Completion of IDP using both employee-provided and organization-provided resources

**Assessment relating to Employee**

- Organizational needs
- Current job standards
- Potential for other Responsibilities
- Current performance
- Research of available resources
- Provide resources, if appropriate and available

**Establish time for initial IDP Meeting**

- Participate in discussion of goals/objectives, activities, target dates, length, and review at quarterly reviews.

7. Progress Reviews		Progress Review Comments
Dates	Initials	
	Employee	Manager

8. Training Officer (signature) (optional)

Date

Comments:

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### Instructions for Completing IDP Form, Individual Development Plan

#### Form Sections:

1. Complete the employee's name, position/grade, organizational location, and short and long-term goals.
2. Experience, training and education, which contribute to the goal(s): Be sure to include all relevant information that currently qualifies the employee for his/her targeted position or goal.
3. The written objective should be a fairly specific statement of what the employee will be able to **do** after the learning activity has occurred. Action verbs should be used such as: define, explain, identify, apply, practice, test, analyze, relate, create, prepare, and evaluate. The following verbs should be avoided because they do not specify the performance the employee is expected to achieve after he or she has completed the learning activity: to be familiar with, to understand, to know, to appreciate, to learn.
4. After the objectives and standards have been defined, the learning activities should be developed to enable the employee to attain the objective. Learning activities could include observation of an experienced employee performing a task, attendance at training courses, reading selected books or documents, and taking self-instructional courses.
5. Any activity requiring On-the-Clock staff hours should be notated in this column. Also an estimate of any training funds required would also be included. The Training Officer (if applicable) could verify if training funds would be available to fund an activity.
6. A target date should be set to begin the learning activity, and entered in the targeted column. Upon completion of the learning activity the completed date should be entered in the appropriate column provided.
7. Quarterly reviews by the Supervisor are suggested to provide feedback to the employee regarding his or her progress in achieving the objective. The recommended length of the IDP is no longer than one year in order to effectively monitor the employee's progress.
8. This section should be signed and dated by the Training Officer or other reviewing official, according to local procedures.

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IDP Form

## APPENDIX

### A. DEFINITION OF ROLES AND COMPETENCIES

This section was taken directly from the American Society for Training and Development (ASTD), “ASTD 2004 Competency Study” for Workplace Learning and Performance Improvement (WLP). WLP is the current ASTD term for Human Resources Development and the Human Resources Development Specialists or Trainers.

#### **ROLES**

Roles are broad areas of responsibility within the WLP profession that require a certain combination of competencies and areas of expertise (AOE) to perform effectively. They are described in sensible, intuitive, and everyday language. Like competencies, roles can be demonstrated in the context of most WLP jobs. Roles are not the same as job titles; they are much more fluid, depending on the application or the project. For the WLP professional, playing the roles is analogous to maintaining a collection of hats—when the situation calls for it, the professional slips out of one role and “puts on” another.

This study has identified four unique roles within the workplace learning and performance profession or Human Resources Development: **Learning Strategist**, **Business Partner**, **Project Manager**, and **Professional Specialist**. These four roles are further defined as follows:

**Learning Strategist**—Determines how workplace learning and performance improvement can best be leveraged to achieve long-term business success and add value to meet organizational needs; leads in the planning and implementation of learning and performance improvement strategies that support the organization’s strategic direction and that are based on an analysis of the effectiveness of existing learning and performance improvement strategies.

**Business Partner**—Applies business and industry knowledge to partner with the client in identifying workplace performance-improvement opportunities; evaluates possible solutions and recommends solutions that will have a positive impact on performance; gains client agreement and commitment to the proposed solutions and collaboratively develops an overall implementation strategy that includes evaluating impact on business performance; uses appropriate interpersonal styles and communication methods to build effective long-term relationships with the client.

**Project Manager**—Plans, resources, and monitors the effective delivery of learning and performance solutions in a way that supports the overall business venture; communicates purpose, ensures effective execution of an implementation plan, removes barriers, ensures adequate support, and follows up.

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**Professional Specialist**—Designs, develops, delivers, or evaluates learning and performance solutions; maintains and applies an in-depth working knowledge in any one or more of the workplace learning and performance specialty areas of expertise, including Career Planning and Talent Management, Coaching, Delivering Training, Designing Learning, Facilitating Organizational Change, Improving Human Performance, Managing Organizational Knowledge, Managing the Learning Function, and Measuring and Evaluating.

### Areas of Expertise

Professional areas of expertise are the specific technical and professional skills and knowledge required for success in WLP specialty areas. Think of AOE as the knowledge and skills an individual must have above and beyond the foundational competencies. In order to function effectively in a given AOE, a person must display a blend of the appropriate foundational competencies and unique technical/professional skills and knowledge. An individual may have expertise in one or more of the following specialty areas (listed alphabetically below):

Career Planning and Talent Management  
Coaching  
Delivering Training  
Designing Learning  
Facilitating Organizational Change  
Improving Human Performance  
Managing Organizational Knowledge  
Managing the Learning Function  
Measuring and Evaluating.

### Designing Learning

*Designing, creating, and developing learning interventions to meet needs; analyzing and selecting the most appropriate strategy, methodologies, and technologies to maximize the learning experience and impact.*

PLEASE NOTE: *This information is based in part on the ibstpi (International Board of Standards for Training, Performance and Instruction) competency study for instructional design competencies: The Standards (R. Richey, D.C. Fields, & M. Foxon, with R.C. Roberts, T. Spannaus, & J.M. Spector, [2001]).*

### Improving Human Performance

*Applying a systematic process of discovering and analyzing human performance gaps; planning for future improvements in human performance; designing and developing cost-effective and ethically justifiable solutions to close performance gaps; partnering with the customer when identifying the opportunity and the solution; implementing the solution; monitoring the change; evaluating the results.*

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PLEASE NOTE: *This information is based in part on ASTD Models for Human Performance Improvement (Rothwell, 1996 and 2000).*

### **Delivering Training**

*Delivering learning solutions (for example, courses, guided experience) in a manner that both engages the learner and produces desired outcomes; managing and responding to learner needs; ensuring that the learning solution is made available or delivered in a timely and effective manner.*

### **Measuring and Evaluating**

*Gathering data to answer specific questions regarding the value or impact of learning and performance solutions; focusing on the impact of individual programs and creating overall measures of system effectiveness; leveraging findings to increase effectiveness and provide recommendations for change.*

### **Facilitating Organizational Change**

*Leading, managing, and facilitating change within organizations.*

PLEASE NOTE: *This information is based in part on the 20th edition of the Organization Change and Development Competency Effort. Contributors include ODN (Organization Development Network), ODI (Organization Development Institute), the Academy of Management Directors of OD university programs, Twin Cities ASTD Chapter, and more than 3,000 individuals from around the world. R. Sullivan, W.J. Rothwell, and C. Worley coordinated the ongoing research.*

### **Managing The Learning Function**

*Providing leadership in developing human capital to execute the organization's strategy; planning, organizing, monitoring, and adjusting activities associated with the administration of workplace learning and performance.*

### **Coaching**

*Using an interactive process to help individuals and organizations develop more rapidly and produce more satisfying results; improving others' ability to set goals, take action, make better decisions, and make full use of their natural strengths.*

PLEASE NOTE: *This information is based on the ICF (International Coach Federation) Credentialing Process Examination.*

### **Managing Organizational Knowledge**

*Serving as a catalyst and visionary for knowledge sharing; developing and championing a plan for transforming the organization into a knowledge-creating and knowledge-sharing entity; initiating, driving, and integrating the organization's knowledge management efforts.*

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### **Career Planning and Talent Management**

*Ensuring that employees have the right skills to meet the strategic challenges of the organization; assuring the alignment of individual career planning and organization talent management processes to achieve an optimal match between individual and organizational needs; promoting individual growth and organizational renewal.*

### **COMPETENCIES**

Competencies are clusters of skills, knowledge, abilities, and behaviors required for job success. Managers need to know about competencies to make appropriate personnel decisions and guide employees' performance. Employees need to know about competencies because they provide a road map of how to succeed on the job. The study identified the following set of competencies—presented below in alphabetical order—that are considered important and necessary for the majority of individuals in the workplace learning and performance profession:

Analyzing Needs and Proposing Solutions  
Applying Business Acumen  
Building Trust  
Communicating Effectively  
Demonstrating Adaptability  
Driving Results  
Influencing Stakeholders  
Leveraging Diversity  
Modeling Personal Development  
Networking and Partnering  
Planning and Implementing Assignments  
Thinking Strategically.

These competencies are grouped into clusters (Business/Management, Interpersonal, and Personal) to facilitate understanding. The competencies are listed alphabetically under each cluster.

#### **Business/Management Competencies**

Analyzing Needs and Proposing Solutions  
Applying Business Acumen  
Driving Results  
Planning and Implementing Assignments  
Thinking Strategically.

#### **Interpersonal Competencies**

Building Trust  
Communicating Effectively

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Influencing Stakeholders  
Leveraging Diversity  
Networking and Partnering.

### **Personal Competencies**

Demonstrating Adaptability  
Modeling Personal Development.

### **Interpersonal Competencies**

#### **Building Trust**

*Interacting with others in a way that gives them confidence in one's intentions and those of the organization.*

#### **Key Actions**

**Operates with integrity**—*Demonstrates honesty and behaves according to ethical principles; ensures that words and actions are consistent; walks the talk; behaves dependably across situations.*

**Discloses position**—*Shares thoughts, feelings, and rationale so that others understand positions and policies. Maintains confidentiality—Keeps private or sensitive information about others confidential.*

**Leads by example**—*Serves as a role model for the organization's values; takes responsibility for delivering on commitments; gives proper credit to others; acknowledges own mistakes rather than blaming others.*

**Treats people fairly**—*Treats all stakeholders with dignity, respect, and fairness; listens to others without prejudging; objectively considers others' ideas and opinions, even when they conflict with prescribed policies, procedures, or commonly held beliefs; champions the perspectives of different partners even in the face of resistance; engages in effective conflict resolution.*

**Ensures compliance with legal, ethical, and regulatory requirements**—*Ensures that processes and results comply with relevant legal, ethical, and regulatory requirements; monitors compliance and creates reports if needed.*

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### **Communicating Effectively**

*Expressing thoughts, feelings, and ideas in a clear, concise, and compelling manner in both individual and group situations; actively listening to others; adjusting style to capture the attention of the audience; developing and deploying targeted communication strategies that inform and build support.*

### **Influencing Stakeholders**

*Selling the value of learning or the recommended solution as a way of improving organizational performance; gaining commitment to solutions that will improve individual, team, and organizational performance.*

### **Leveraging Diversity**

*Appreciating and leveraging the capabilities, insights, and ideas of all individuals; working effectively with individuals having diverse styles, abilities, motivations, and backgrounds (including cultural differences).*

### **Networking and Partnering**

*Developing and using a network of collaborative relationships with internal and external contacts to leverage the workplace learning and performance strategy in a way that facilitates the accomplishment of business results.*

## **Business/Management Competencies**

### **Analyzing Needs and Proposing Solutions**

*Identifying and understanding business issues and client needs, problems, and opportunities; comparing data from different sources to draw conclusions; using effective approaches for choosing a course of action or developing appropriate solutions; taking action that is consistent with available facts, constraints, and probable consequences.*

### **Key Actions**

**Gathers information about client needs**—*Collects information to better understand client needs, issues, problems, and opportunities; reviews organizational information and human performance outcomes; studies organizational systems to better understand the factors affecting performance; integrates information from a variety of sources; asks internal and external partners for input and insight.*

**Diagnoses learning and performance issues**—*Uses research methods to isolate the causes of human learning and performance problems; proposes theories to understand and explain the factors affecting performance; detects trends, associations, and cause-effect relationships.*

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**Generates multiple alternatives**—*Gathers information about best practices; thinks expansively and brainstorms multiple approaches; generates relevant options for addressing problems/opportunities and achieving desired outcomes; maintains a database or bank of possible solutions and their effectiveness.*

**Searches for innovative solutions**—*Challenges paradigms and looks for innovative alternatives; draws upon diverse sources for ideas and inspiration in creative problem-solving activities.*

**Chooses appropriate solution(s)**—*Formulates clear decision criteria; evaluates options by considering implications, risks, feasibility, and consequences on the client system and on other parts of the organization; prioritizes and chooses an effective option.*

**Recognizes impact**—*Considers the implications of learning and performance decisions, solutions, and strategies in other contexts; makes decisions using a broad range of knowledge that extends beyond the limitations of the organization and its immediate needs.*

**Proposes solution(s)**—*Recommends a plan or process for making changes; clearly explains rationale for the recommended solution and how it will address the performance gap or opportunity.*

### **Applying Business Acumen**

*Understanding the organization's business model and financial goals; utilizing economic, financial, and organizational data to build and document the business case for investing in workplace learning and performance solutions; using business terminology when communicating with others.*

### **Driving Results**

*Identifying opportunities for improvement and setting well-defined goals related to learning and performance solutions; orchestrating efforts and measuring progress; striving to achieve goals and produce exceptional results.*

### **Planning and Implementing Assignments**

*Developing action plans, obtaining resources, and completing assignments in a timely manner to ensure that workplace learning and performance goals are achieved.*

### **Thinking Strategically**

*Understanding internal and external factors that impact learning and performance in organizations; keeping abreast of trends and anticipating opportunities to add value to the business; operating from a systems perspective in developing learning and performance strategies and building alignment with business strategies.*

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### Personal Competencies

#### **Demonstrating Adaptability**

*Maintaining effectiveness when experiencing major changes in work tasks, the work environment, or conditions affecting the organization (for example, economic, political, cultural, or technological); remaining open to new people, thoughts, and approaches; adjusting effectively to work within new work structures, processes, requirements, or cultures.*

### Key Actions

**Seeks to understand changes**—Seeks to understand changes in work tasks, situations, and environment as well as the logic or basis for change; actively seeks information about new work situations and withholds judgment.

**Approaches change positively**—Treats changes as opportunities for learning or growth; focuses on the beneficial aspects of change; speaks positively and advocates the change when it helps promote organizational goals and strategy.

**Remains open to different ideas and approaches**—Thinks expansively by remaining open to different lines of thought and approaches; readily tries new and different approaches in changing situations.

**Adjusts behavior**—Quickly modifies behavior to deal effectively with changes in the work environment; acquires new knowledge or skills to deal with the change; does not persist with ineffective behaviors; shows resiliency and maintains effectiveness even in the face of uncertainty or ambiguity.

**Adapts to handle implementation challenges**—Effectively handles global, cultural, economic, social, and political challenges to the effective implementation of learning and performance solutions; works to overcome barriers and deal constructively with nontraditional or challenging situations.

### Modeling Personal Development

Actively identifying new areas for one's own personal learning; regularly creating and taking advantage of learning opportunities; applying newly gained knowledge and skill on the job.

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### **B. Guidance for the SMART Goal Setting**

#### **SMART Goal Setting**

I encourage you to pick up a pen and a piece of paper and jot down the goals you want to reach. Look at each goal and **evaluate** it. Make any changes necessary to ensure it meets the criteria for a **SMART goal**:

**S** = Specific  
**M** = Measurable  
**A** = Attainable  
**R** = Realistic  
**T** = Timely

#### **Specific**

Goals should be straightforward and emphasize what you want to happen. Specifics help us to **focus our efforts** and **clearly define what we are going to do**.

Specific is the What, Why, and How of the SMART model.

**WHAT** are you going to do? Use action words such as direct, organize, coordinate, lead, develop, plan, build etc.

**WHY** is this important to do at this time? What do you want to ultimately accomplish?

**HOW** are you going to do it? (By...)

Ensure the goals you set are very **specific, clear and easy**. Instead of setting a goal to lose weight or be healthier, set a specific goal to lose 2cm off your waistline or to walk 5 miles at an aerobically challenging pace.

#### **Measurable**

**If you can't measure it, you can't manage it.** In the broadest sense, the whole goal statement is a measure for the project; if the goal is accomplished, the project is a success. However, there are usually several short-term or small measurements that can be built into the goal.

Choose a goal with measurable progress, **so you can see the change occur**. How will you see when you reach your goal? Be specific! "I want to read 3 chapter books of 100 pages on my own before my birthday" shows the specific target to be measure. "I want to be a good reader" is not as measurable.

**Establish concrete criteria for measuring progress** toward the attainment of each goal you set. When you measure your progress, you stay on track, reach your target dates, and

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experience the exhilaration of achievement that spurs you on to continued effort required to reach your goals.

### **Attainable**

When you identify goals that are most important to you, you begin to figure out ways you can make them come true. You develop that attitudes, abilities, skills, and financial capacity to reach them. You begin seeing previously overlooked **opportunities** to bring yourself closer to the achievement of your goals.

Goals you set which are too far out of your reach, you probably won't commit to doing. Although you may start with the best of intentions, the knowledge that it's too much for you means your subconscious will keep reminding you of this fact and will stop you from even giving it your best.

**A goal needs to stretch you slightly so you feel you can do it and it will need a real commitment from you.** For instance, if you aim to lose 20lbs in one week, we all know that isn't achievable. But setting a goal to loose 1lb and when you've achieved that, aiming to lose a further 1lb, will keep it achievable for you.

**The feeling of success which this brings helps you to remain motivated.**

### **Realistic**

**This is not a synonym for "easy."** Realistic, in this case, means "**do-able.**" It means that the learning curve is not a vertical slope; that the skills needed to do the work are available; that the project fits with the overall strategy and goals of the organization. A realistic project may push the skills and knowledge of the people working on it but it shouldn't break them.

**Devise a plan** or a way of getting there which makes the goal realistic. The goal needs to be realistic for you and where you are at the moment. A goal of never again eating sweets, cakes, crisps and chocolate may not be realistic for someone who really enjoys these foods.

For instance, it may be more realistic to set a goal of eating a piece of fruit each day instead of one sweet item. You can then choose to work towards reducing the amount of sweet products gradually as and when this feels realistic for you.

Be sure to set goals that you can attain with some effort! Too difficult and you set the stage for failure, but too low sends the message that you aren't very capable. **Set the bar high enough for a satisfying achievement!**

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### **Timely**

Set a timeframe for the goal: for next week, in three months, by fifth grade. Putting an end point on your goal gives you a **clear target** to work towards.

If you don't set a time, the commitment is too vague. It tends not to happen because you feel you can start at any time. Without a time limit, there's no urgency to start taking action now.

**Time must be measurable, attainable and realistic.**

Everyone will benefit from goals and objectives if they are SMART. SMART, is the instrument to apply in setting your goals and objectives.

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**[Click here for advanced goal setting techniques!](#)**

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**C. RECOMMENDED TRAINER COMPETENCIES READING LIST**

[Mapping Your Future: Putting New Competencies to Work for You](#)

T+D, v58 n5 p94-101 (May 2004)

Journal Article

This final article in a series of three focuses on how to use the results of the new Competency model. The authors outline how professionals in the field can use this new information to enhance and re-direct their careers, identify how organizations can use the new model as a recruitment and selection tool, and lastly share ideas that will enhance the academic preparation for the field. The article concludes with a Guide for Educators.

[Landmark Study: New Roles and New Competencies for the Profession: Are You Ready for the Next Generation?](#)

T+D, v58 n4 p26-36 (April 2004)

Journal Article

This article explains the new roles and competencies for learning, training, and performance professionals. The triangle visual used to illustrate the 2004 ASTD competency model begins by defining broad-based foundational competencies, narrows to specific areas of expertise, and peaks with examples of various roles. This article covers recent trends in the field, a full explanation of each level in the model and the updated learning and performance wheel. This article is Part 2 of a three-part series.

[Be an Active and Participative Instructor](#)

LEARNING CIRCUITS, v4 n12 (December 2003)

Web article

This article defines the attributes of online instructors who foster effective learner-centered experiences. It suggests that instructors facilitate four other factors-student motivation, useable technology, opportunities to collaborate and interact, and the program blend that come together to make online learning work.

[Demystifying Performance: Getting Started](#)

T+D, v57 n7 p40-45 (July 2003)

Journal Article

This article describes how to build confidence and credibility. In this follow up article on demystifying performance, focus is on developing performance consulting competencies. The authors suggest the following pointers: identify the right client, who is not necessarily the middle manager but the business owner; get the right project after analyzing the client's business and financial data.

[Careers in E-learning: Taking the Next Step](#)

LEARNING CIRCUITS, v3 n11 (November 2002)

Web article

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This article urges trainers to take charge of developing their e-learning skills. The author includes a chart to assist professionals identify what skills they possess and which skills they need. Forman shares insights about the best locations to work and discusses the eight skills and seven competencies needed to be an effective elearning practitioner.

### [Transitioning Technical Instructors to the Web](#)

LEARNING CIRCUITS, v3 n10 (October 2002)

Web article

This article describes the steps taken by New Horizons Computer Learning Centers to transition their classroom-based instructors to online instructors. The author explains that the decision to move courses beyond the traditional bricks and mortar offerings required a culture shift throughout the organization. The article compares the differences between traditional and online instructors' skill sets.

### [Wearing Four Pairs of Shoes: The Roles of E-learning Facilitators](#)

LEARNING CIRCUITS, v3 n10 (October 2002)

Web article

E-learning 1.0. This article describes four roles of e-learning facilitators as: instructor, social director, program manager, and technical assistant. The author urges classroom-based instructors to add skills to help transition into an e-learning environment.

### [Meet the New Chief Learning Officers](#)

T+D, v56 n5 p80-89 (May 2002)

Journal Article

This article examines the responsibilities of chief learning officers and how executives move into this position. The authors discuss the core competencies and critical skills of CLOs, based on interviews with 15 CLOs. These competencies include business literacy, strategic thinking, excellent communication skills, and influencing skills. The article states that a Conference Board report in 2000 found that 6 percent of surveyed companies had integrated learning functions.

### [E-learning Competencies](#)

LEARNING CIRCUITS, v2 n3 (March 2001)

Web article

Lists 31 competencies that enable people to select, manage, and use e-learning. Groups the competencies into generic categories: general, management, distribution methods and presentation methods.

### [Evaluating Trainer Effectiveness](#)

INFO-LINE, 16p (March 2001)

Stock no. 250103. This Info-line presents a model to evaluate the effectiveness of trainers. It lists the ASTD and IBSTPI competencies for instructors and describes strategies for developing training skills such as certification, mentoring, and development plans. The author explains how to improve trainers' credibility and

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recruit and select instructors. A trainer selection criteria form and an interview notes summary form are the Job Aids.

### **Career Moves: Take Charge of Your Career Now!**

ASTD Book ISBN: 1-56286-290-1

152p (2001)

This book presents a practical methodology for planning and developing a career in the human resource development (HRD) field. It reviews trends and issues that influence the HRD field and identifies emerging roles, practices, and functions. The authors explain how to manage an HRD career for success and fulfillment and offer an HRD career opportunities model and an HRD professional design plan. It provides guidelines for preparing for transitions and creating a new career path. Numerous exercises and self-assessments, such as professional design plans, assessing learning options, and navigating transitions are included.

### **CONTACT US**

We hope that you will find the information in this document understandable, helpful and practical for your use. Please send any questions, comments or suggestions/recommendations for “continuous improvement” to Ms. Helen Sampson at [helen.sampson@ngb.af.mil](mailto:helen.sampson@ngb.af.mil)

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