Individual Development Plan (IDP) Webinar for AMS
Transcript

Hello everyone and welcome to the webinar on individual development plans. I made an announcement earlier and I will repeat myself to those who just joined. So that we can get some good audio, please make sure your telephone lines are muted, as well as your computer speakers. If your computer speakers are not muted, we may hear an echo or some background feedback. So please make sure again that your computer speakers are muted as well as your telephone lines. And then, if you have any cellular phones nearby, you would want to mute those and move them away from the telephone. Sometimes they produce some feedback. So for the moment, I actually have all of you muted so that you can ask questions over the phone as we go along. I'm going to unmute the phones right now and we will see how things sound.

All participants are now and interactive talk mode.

Okay. Again please make sure your phones are muted. I do here little bit of background but it was not as bad as earlier so I will keep you all unmuted so that you can feel free to ask questions as we go along. You can also ask questions as we go along in the chat area.

My name is Leslie Linneman and I will be delivering the webinar for today. Also here today with me is Mark Branch, our AgLearn administrator, who answer any questions that I cannot and he will also help me out with answer questions in the chat area.

So thank you for joining us today. Over the next two hours we will be talking about individual development plans. I will give you all a break. In about an hour into this we will have a quick break. We'll talk about IDPs and how to create one, what makes a good IDP, what kinds of things can you include, the meaning behind the IDP and why we have our directive in the first place, how to make your IDP substantial for career growth, and then, how to hold productive conversations with the supervisor and your employees, if you supervise others.

So we will be talking in the beginning part about the benefits of IDPs. And then the second part will be how to complete your IDP in AgLearn. We will have a number of handouts available for you to download at the end, including the presentation slides, as well as a job aid. When we get to the part about doing the IDP in AgLearn, will have a job aid for you that has everything that you will see on the screen step-by-step; just in a paper form.

Creating an IDP that is useful and results in real development over time can be challenging. So, we want to work with you today on how to turn the IDP conversation into something that is enjoyable and productive; that leaves you, and your employees if you supervise others, more motivated and ready to take on challenges for greater productivity and engagement.

So, our objectives for today are to create plans that engage employees. Something that they will stick to and that can generate significant and sustained change. It is not just going to be an exercise or check off the box.

I want to do a quick poll question. Give me one moment and I will pull it up. I want to see those of you (this is an anonymous poll question) to indicate whether you have an IDP right now.

Okay, it looks like for the majority that has responded to the poll, that you do have an IDP. That's great.

So, how useful do you find the IDP at the moment? How useful do find it to be for your development? Let me just pull this up. Not at all, slightly, moderately, or extremely.

No surprise. Every time we see the majority of respondents select “not at all” or “slightly.” And so, hopefully by the end of this webinar today, you will see the IDP as more meaningful. That will be our goal for today.

So, why do we do IDPs? During the Secretary’s cultural transformation listening session, one of the most frequent requests shared by employees was that their supervisor work with them on development. And specifically on IDPs.

All participants are now in listen only mode.

Sorry about the pause. I ended up muting you all because I was hearing some background and some echo. So from now on, please ask any questions in the chat area.

So again, the reason or the meaning behind doing IDPs is all around the cultural transformation listening session. Vilsack also found that supervisors were not doing a good job of helping their employees with development. And so they were being denied opportunities. They were been told that there were not even allowed to complete an IDP. That is the main reason why the IDPs are mandatory. It's not to push learning and development on you. It's to make sure that you have an opportunity to have development goals and activities and the IDP serves as documentation for that.

So the IDPs serves as a commitment that the organization is making to grow and develop employees. It demonstrates that employees are valued and it represents a key step to create the culture of inclusion, diversity and high-performance that we are striving to achieve.

Another reason why we do IDPs is so that our development and our goals can better meet mission goals. You want to consider your unit or your program area, or even your agency’s organizational needs, mission changes, changes in technology, expected turnover, staffing needs, program plans and future needs for particular skills. So we are talking about thinking more strategically. And placing yourself more strategically to better further your career.

The employee viewpoint survey that you may or may not have had an opportunity to participate in, two years ago the results indicated that employees desire more satisfaction in the job. This was USDA-wide. So the IDP also gives you an opportunity for personal and organizational success through inclusion and/or engagement. Another reason is that the IDP can help to develop and motivate you. Engaged and competent/capable employees lead to higher retention and productivity.

I also want to mention that the IDP is a joint employer supervisory responsibility. It is an agreement between the employee and the supervisor based on funds that are available to meet the employee's and the organizational goals. And we will talk about some development opportunities that you can include in your IDP that do not cost any money.

Leadership exists at all levels of the organization. Regardless of your title or your position you can be a leader. Even if an employee does not supervise others, they can still work on leadership skills to be successful in their current position.

And we all know a large number of the workforce is eligible for retirement. Whether they retire right now is uncertain. But there are quite a few that are eligible. And an IDP can serve as documentation for your contribution towards succession planning.

So what exactly is an IDP? It is a clear statement of the employee's goals. It is also a map for attaining goals that specifies immediate and long-term development of needs. It is an individually tailored action plan to improve performance in the current position or to prepare for new responsibilities. It is a written plan for scheduling and managing employee development, as well as a tool for supervisors to estimate the resources needed for employee development training. And it is also a tool for the organization to use to develop its workforce to meet future needs. And again, it is an agreement between the employee and the supervisor based on funds available to meet employee and agency needs.

An IDP is not a corrective action tool for poor performance. Nor is it an unofficial reward system. The IDP is key to the growth the development of an employee and instrumental in helping the employee.

Some of the benefits of the IDP for the employee. What benefits can employee get from the IDP and the exercise of doing the IDP? Well, it can help employees perform duties according to the established job standard. And there the focus is getting the employee to do better on the current position. Another benefit is enhancing job performance. Getting practice at setting reasonable goals. And it also helps you to assess your strengths and weaknesses and determine what strengths you can build upon, what strengths you can bring to the organization and potential weaknesses that you can improve upon.

To be successful in career development it may take several hours of personal time but can prove to be well worth the investment.

And some benefits to the supervisor. The IDP helps the supervisor with development of their employees to achieve knowledge, skills and competencies according to their performance standard. To accurately document the current development needs of the employees is also achieved with the IDP. And the IDP also considers the program or the agency goals mission and vision. As you think about some other benefits, do have any other ideas of what some benefits might be? And you can type in any comments that you have in the chat area.

I see somebody typing. Let me give you guys a minute.

Okay so looks like we covered a good amount of benefits for the employee as well as the supervisor so will go ahead and move on. You guys don't have any other comments. Next I would like to go to the IDP process and how to make it more meaningful. In general there are five steps to the IDP process which is really a continuous cycle. First of which is the pre-meeting preparation. The purpose of the pre-meeting is for the supervisor and the employee to prepare for their meeting together. And these meetings typically occur during performance review time. But they really should be recurring a lot more frequently. So if you are a supervisor, consider having these meetings more frequently with your employee and check in with their development throughout the year. Both parties have preliminary data gathering responsibilities. This planning will not only provide time for discussion during the meeting, but will also facilitate the discussion by having this information readily available. So for the pre-meeting preparation, the employee should be thinking, “Where have I been?”

You should be considering all completion of training activities, including on-the-job training, formal training, development assignments and self-development activities such as AgLearn, books that you have read, self-study courses that you may have taken. And then the employee should think about where they are now. And to answer this question, look at your current position description and your performance elements as well as past performance evaluations. And then think about the work going over the past year. Then, the employee should record what parts of their job they are good at, what kind of work they are good at, what competencies are necessary for them to perform their job well, what competencies they need to develop or strengthen, and what kinds of learning activities do they need to develop or strengthen those competencies. And then think about where can you go and where do want to go. Focus on positions that are interesting to you and determine both your short term goals, and when I say short time I'm thinking about 1 to 2 years. As well as your long-term goals. And that would be about 2 to 5 years down the road. And for the pre-meeting preparation the supervisor also has a number of considerations. The supervisor should ask what the employees strengths are in regards to technical and leadership competencies. Is the employee lacking technical or leadership competencies to perform well? How can the employee attain proficiency in these competencies? What program resources are available to help the employee improve competency levels? The supervisor should also consider the program and agency organizational needs and strategies for the next few years. Ask the supervisor up front what the longer-term strategies are for the organization. Then you can find out where the organization is headed as well as what changes in mission and technology and programs or staff are expected. Should the employee be developed for additional responsibilities? Are they not challenged enough? To they need more responsibilities? If so, what kind? What kind of development will help the employee reach their goal? And what resources can be assigned to support your employee’s development and IDP?

The second step is the actual employee supervisor meeting. The employee should be asking themselves, “Were my performance standards met?” If not, a good start is to identify a career goal if there are some gaps in your performance standards and whether they were met. Ask questions like, “Why is it important to my unit the organization that I increase my skill in this area or develop this competency?” “What difference will it make to the organization?” You want to build skills that have a payoff for the organization.

You also want to think about some goal setting and review short and long-term goals. Ask yourself if your goals are realistic and attainable. To what extent do your goals mesh with those of the program of agency? And what is your level of commitment towards attaining those goals?

Also you want to review your current competency positions. What competencies do you possess? What competencies do you need to develop? You may or may not have heard of the 360° assessment. It gives you feedback from your supervisor, your peers, your customers, as well as your direct reports if you have any. That is a good way and a good tool to start reviewing your competency proficiency.

Look at other assessments that may be out there. There are complex assessments and StrengthsFinder. StrengthsFinder will help you find what strengths you have and how to leverage the strengths. When we look at just improving our weaknesses and not pay attention to our strengths you are really selling yourself short you do that. Research on successful development programs consistently come to the same conclusion. Organizations benefit more from building on strengths that from shoring up weaknesses. Marcus Buckingham is the author of a book entitled, “Now Develop Your Strengths.” In the book he says, “Most organizations take their employees’ strengths for granted and focus on minimizing their weaknesses. But this isn’t development, it is damage control.” Based on your own knowledge of skills that you are particularly good at, or information from past performance appraisals, you can identify a strength to be enhanced further to produce world-class performance.” Let’s say you are considered an expert in your field. Have you thought about mentoring another person so that you can transfer that knowledge on to others? That is one way that you can build upon your strengths.

But don't overlook the possibility that you may indeed have shortcomings that do demand developmental attention.

Again you can see here identifying competency gaps. Where are the gaps in your needs and your level of competence?

As you identify the competency gaps, rank and discuss possible learning experiences that will meet the employee’s development needs as well as the program and agency’s need. Then select those activities that are most optimal in meeting both of those needs. And we will discuss various options today.

We will continue to look at step two and pick up with supervisors responsibilities. We will address what we see in the department’s IDP directive, as well as address what makes good business sense to build personal and organizational success. You begin by striving for a two-way discussion. Striving for a two-way conversation may seem obvious AND, in our busy lives, we could make this just a mechanical exercise, e.g., send information back and forth by email or use the AgLearn process where we hit a button and the IDP gets completed by a mechanical exchange between employee and supervisor. Quite frankly, if you used AgLearn and are just trying to check off the box, you could do it. We hear from employees in the various surveys and listening sessions that they think/feel that supervisors don’t care about their development; chances are, this is why.

Again I want to bring you back to cultural transformation, which promotes having ongoing dialogue and information sharing between supervisors and employees. So this whole discussion is to create the IDP and to check in on learning and progress and application over time. It does take two to have the discussion and either the employee or the supervisor can initiate the conversation.

What goes into this type of discussion? There are many models for having a dialogue and you may have seen one in a course or otherwise learn the skills that we see here on the screen. The two-way discussion is a collaborative effort and the three steps are for both employee and the supervisor.

The first step is to explore rather than react. Before deciding, explore interests, needs, strengths, and options. Supervisors may ask questions like, “What ideas do you have and what makes this important for you?” “How does this activity help you with your project?” “What are some of the challenges in meeting your goal?” “What other thoughts do you have?” Step two is listening. Say things like, “So, what you are saying is…” “It sounds like…” “Are you are concerned that…” or “Let me see if I've understood what I've heard so far.” Paraphrase and ensure the other party that you are in fact listening. And then the third and final step is once you have explored the issue fully, respond with ideas or explain your reasoning.

You will likely explore and listen for a while before sharing your ideas. Be sure to get what is important as you consider it to create a plan that will lead to personal as well as organizational success.

I would like to bring up another poll question. How many times a year to have this type of discussion with your employees if you supervisor others. Or if you are not a supervisor, how many times a year does your supervisor have this type of discussion that we talked about with you? Poll shows 0-2 or 15+ as options. We did not include 3-14 to be humorous. And you can see here in the results: during the performance review, when you create the plan, and in mid-year, when you review the plan. We suggest you could indeed have this type of discussion even if just informally or for just a short check in. It does not have to be a long elaborate meeting. For example you may have to discuss the employees IDP or your IDP with new projects you are assigned or with the priorities our budgets have changed. The plan is not written in stone. It can change numerous times throughout the year and numerous things change in our own career and priorities within the organization. And so, as those things change, you can change your development needs as well.

You may want to hold more conversations with new employees and that is for the supervisors in the webinar today. You may have to have conversations with new employees to come up with a short term plan for early orientation and just to get an idea on what the development goals are.

Help them reality test their ideas. This means you should help them be realistic and objective about what activities will best suit the needs of them and the program or agency. And consider that not everyone learns the same. Find out how your employee learns best and how can they learn best.

If their idea requires available money or time, how else can they learn what they are setting out to learn?

If they cannot do a particular activity, what can they do and how can we help them out? Tell them about resource limitations. And who else needs to be involved.

Take time to prioritize these development activities with the employee. What exactly goes into the prioritization process? We will look at that next.

This is just one set of tools I found effective for prioritizing activities in an IDP. The first bullet of improving the employees current job performance relates to an earlier comment on leveraging strengths and being sure to address any shortcomings that demand attention.

Maybe the employee needs to be more challenged. They're doing well in their current job. Their strengths are leveraged upon. There are minimal weaknesses. The next step or the next priority will be for challenging the employee more responsibilities to learn the skills to complete a particular project or new project. But the first two criteria have already been met, then you want to focus on career development. Finding out where an employee may be better fit. It's okay and you may be very cautious to lose employees. But keep in mind that if the employees move on to other things that are leveraging their strengths more or they are more satisfied with, you help to contribute to their success and they are happier. That also produces more productivity and more engaged employees.

Back to the supervisor responsibilities for the meeting. You want to also identify criteria for the employee to use in evaluating their development work such as statements from performance plans and other assessments they might have completed. The supervisor and employee both need to be clear about what their priorities are and why a particular activity is important to go on the plan. Use the two-way communication model to ensure understanding and picture of success. The supervisor’s role is to create and set the context. And provide resources to the employee. Give them time to complete development activities on the job and provide any physical resources that you may have available. Or access to particular learning activity.

Let's move on to step through which is preparing the IDP in AgLearn. Before moving on, I just want to pause and see if anyone has any questions related to anything we discussed so far. If you do please feel free to type those into the chat area before we move on to completing the IDP in AgLearn.

As we are thinking about processes I do want to remind you all that the AgLearn is recommended tool for the IDP. However, we have some employees that are in very remote areas as I'm sure you do as well. If you and the supervisor, the employee and the supervisor, agree that the employee can create a paper-based form, that is allowed. However, there is a survey that you must complete in AgLearn, documenting the use of the paper-based form. And I will go over that a little bit later.

I did just want to remind you that AgLearn is strongly encouraged and highly recommended. Again feel free to ask questions as we go along. If I'm going too fast and if I need to slow down, please let me know.

Let's start by introducing the term trusted source document. We can also substitute the term official document. So, for the AgLearn IDP, this means that only those people who are the authoritative owners of the learner's IDP can modify and maintain the document. In general, it is the employee and supervisor that are the authoritative owners of the employee's IDP. While the agency might use data in the IDP to identify trends, no other individuals including AgLearn Administrators can make changes to your IDP.

I also want to bring attention certain control mechanisms that are in place to control the validity in AgLearn. All changes and updates have to be documented by the employee and the supervisor. And all changes have to be submitted and approved before the end of the plan period. This runs from the fiscal year or aligns with the fiscal year.

The only other difference between that AgLearn IDP and the paper-based form that you may be used to is that only one person can make a change to the plan at any time. Think of the IDP as a tennis match. The employee creates the IDP and then submits for approval to their supervisor. That action sends the tennis ball over the net, so to speak, to the supervisor. At that point the employee should make no changes to the plan until the plan comes back into their court. The supervisor should get an e-mail that the employee has submitted IDP and the supervisor should take action quickly to review and approve or reject the plan.

Once the supervisor approves or rejects the plan it is sent back over to the employee's court and it is in the employee's hands at that point.

Some tips before you begin creating your IDP. First, make sure that your correct current supervisor is listed in AgLearn. I have a job aid at the end on how to change your supervisor in AgLearn. But it is very easy to see who is listed in the supervisor category in your AgLearn profile by clicking on your name immediately when you login. When you login to AgLearn the top left-hand corner you will see your name. If you click there it will bring you to your profile and you can see who your supervisor is listed as in your AgLearn profile. If it is blank that means that no supervisor is there and you need to add your current supervisor. I have a job aid after the webinar for you to download.

There are a number of fields in the IDP and only those that are required are marked with a red asterisk. As we move through the next few screens, I'll point out the required fields as we go along. That is really all that is necessary and we do not need to make it more complicated. Let's keep it simple. That's what I'm going to preach as we go little bit further in.

Use the calendar icon whenever you are asked to enter dates in AgLearn. Because I'm sure you have figured out by now that AgLearn can be a little sensitive, especially formatting. So any time you are prompted to enter a date we can use the AgLearn calendar icon feature. And make sure that the pop-up blocker in your Internet is turned off with AgLearn.

Okay let's start to look at our IDP and AgLearn. First want to log into AgLearn. You want to scroll down depending on what your screen size is. Most of us do not need to scroll down. Go to the bottom right-hand part of the page. And you'll see a box that I have here on the screen and it says "Learning Status" with five categories. To start your IDP, select "IDP goals."

Then on the left side, excuse me, on the right side under "Goal Links" click "Create Plan." I also want to point out that sometimes the page may not load or you may not see information right away. It may take a few seconds to load, but clicking the links repeatedly will only make it worse. So you have to be patient here.

Next you need to select the plan period. Again we run the IDP cycle along with the fiscal year so we already have the plan period. Then select the plan type and development is your only option so that will be easy. Select "Development." And then type in a unique name for your IDP in the plan name that reflects the time period such as my FY 2013 IDP. The description is not required. You can leave that blank.

Then click "Save and Add Goal." Goals have to be measurable and tied to a specific date. All IDPs must have at least one goal. We also create activities under your goal for this section. But goal is what you hope to accomplish and activity is how you will accomplish it. Each goal could have a number of fields. But the only required fields are the goal name, the target dates and the section.

What you want to do is where you see the goal name, manually type in your goals. So my goal for this particular example is to improve communication among coworkers. The next required field is the target date and depending on your screen size, you may or may not be able to see the calendar icon but I have circled it and highlighted it and that is where you want to click on that button and select your target date.

Because we are doing our IDPs along with the fiscal year, select FY2014 in the Plan Period field, which is the only option you can select. I select my target date for goals to be the last day of the fiscal year so that I don't get any errors that may come up. So to bypass all of that, it is a good idea if you just want to use your target date as the very last day of the fiscal year.

Then you need to select a section and it is short-term, midterm or long-term. Short-term for this exercise is going to be around three months. Midterm would be around six months and long-term would be 12 months. That is just to help you prioritize which goals are more immediate and which ones could be accomplished a little later down the road.

Next we will add activities to your goal. Activities can be attached to goals by you or your supervisor to identify things you may want to do to help reach a goal. For example, if your goal is to become more proficient in Microsoft Excel charts, then you may have an AgLearn course which will cover advanced topics of Excel charts.

There are two types of activities. Activities using learning items. And those are just activities that you can find in AgLearn. The other type of activity, external activity, is if you have anything that can be done outside of AgLearn. Is there is a book that you want to read or shadow assignment

that you want to complete or if you want to be a mentor than that would be considered an external activity. Anything that is outside of AgLearn is external. And there only two required fields here and that is the activity name and target date.

Let's see how to complete these two steps. So we click on Create Activity. And you can select either create activity using learning items, which would be searching within AgLearn. Anything else outside of AgLearn, you will select Create External Activity.

I will click on Create Activities Using Learning Items. A new window pops up. Notice there are already items listed even though I have not yet typed in anything in the keyword field. After I type something in the keyword field, my search results will appear. Let's do that next.

My goal is to improve communication with my coworkers. And I know that my coworkers come from a variety of different generations. And that communicating with each one is different. I just want to learn a little bit more about how to communicate with each of the generations. I want to locate a course on generational differences. I type generational differences in the keyword field. Generally I don't click on the "exact phrase" so I get as many results as possible. By keeping it more open you will get a lot more options to choose from. After typing in your keyword, click on Search.

For this particular example I have four courses that came up. Of the four courses, the last two look like something I am interested in taking. So I click the box next to each course name. And click on add. In this particular step once you add the activities to your IDP you can decide if it's interesting.

The two courses have now been added to my IDP. Next we want to add an external activity. These are the items that you can find outside of AgLearn. As you think about other activities that you may want to include in your IDP other than AgLearn courses, what are some ideas that you can include in your IDP other than AgLearn courses and classroom courses? Go ahead and type in the chat area any ideas that you may have.

Alright, we have meetings, conferences, books, independent reading. Absolutely. Webinars. Yes.

Job shadowing is another big one. Good job. Special emphasis projects. Certifications that might be required for your job. Good and you guys have some new ideas and other things you can include. So often we have just been accustomed to including courses in AgLearn. There's so much more that you can add. So let's take a look at those.

People learn from developmental experiences to different degrees and in different ways. So what works best for one may not work best for another. Here are some other ways that you could develop yourselves with types of external activity you could add to your IDP. On-the-job training. Structured on-the-job training is the most frequently used method of individualized learning. In this situation, the employee is counseled or coached while actually performing a duty or a set of duties. It usually involves individual instruction by the supervisor or designated staff

member because of his or her experience in the tasks or procedure being learned. This approach can be used to teach applies to procedures, tasks and technology.

Formal classroom training is one example of external activity. Most of you are probably pretty aware with what a formal classroom training is. But, depending on the objectives and the specific program and instructors approach, this experience can be very valuable. It might be the only alternative that you have for acquiring specific or specialized technical or managerial competencies such as certifications required for your position. A lot of folks in the medical field and in our agency we have a lot of veterinarians. And while they can learn a particular skill through self-study, a lot of times, you have to go in and physically perform the activity to be sure that they have done it properly. In many instances however, formal classroom training is not the only way for an employee to learn.

Self-directed development. When an employee aspires to a new career and his or her development needs cannot be directly related to present or anticipated work assignments. Or if resources are not available then the employee may undertake self-development activity such as watching educational or training videos. AgLearn actually offers very short videos for a variety of competencies. And the quality of offerings are constantly improving. You can look for e-mails on what is new and available from the AgLearn team. And it is an increasingly valuable resource.

Another example of self-directed development are the self-study courses that I mentioned several times. You could also conduct informational interviews. Perhaps you want to learn more about something. Conducting interviews for informational purposes is one way to do that.

Also reading books or publications in journals. Also want to mention if you are not aware that AgLearn has a wide variety of the books available on Books 24/7. And finally another example of self-directed development is using computer-assisted training programs. So let's say if you want to learn a new language. Rosetta Stone is an example of a computer-assisted training program.

Mentoring and coaching. Let's go over this because mentoring typically involves someone that is experienced with the organization and that has a lot of knowledge and is respected in the organization. And they mentor a junior employee or someone trying to seek new skills in a new area. And the difference between mentoring and coaching is that coaching has the same purpose, but with mentoring, the mentor tends to provide advice and guidance to the employee. Whereas in coaching, the coach works to facilitate that. So the coaches are not giving the employee advice, they're going to help the employee try and figure it out on their own. They just facilitate, ask a lot of open-ended questions so that the employee can make the ultimate decision on what works best for them.

Job shadowing. I saw someone mention that earlier. This involves providing an employee with the opportunity to observe a well-qualified employee perform a particular skill or set of skills.

Immediately following the shadow assignment, the learner needs to have the opportunity to perform the same skill and be given feedback on the performance.

Detail assignments. This involves short-term assignments, particularly appropriate for important skills that make up a small portion of an individual's job.

In our consulting we are finding the detailed assignments are being used very effectively and the folks are coming back to their program with more broadened and organizational perspective.

Task force assignments are particularly effective if the employee has an opportunity to work with well-qualified people who will provide feedback to the learner on his or her performance and participation in the group. And creating job aids or job aid development. This requires creating templates to develop a product that will assist in the performance of a job. Technical job aids directly related to the job that the employee can develop for cross program assignments, among special work projects, and maybe even coaching and mentoring other employees.

I'm not sure if you are all familiar with the AMS Training SharePoint site. I have the link here. And if you have not already, I strongly suggest bookmarking it. It is updated very frequently and shows all of the training opportunities and webinars that are available to AMS employees.

I would stay on the page for couple more seconds if you would like to write down the link.

Okay. So these are just some examples of external items that you may want to include and some resources you could include on your IDP. So let's go to the steps of how to add that external item to your IDP. You are going to click on Create New Activity. This time you're going to select Create External Activity. As you may recall, my goal is to improve communication with coworkers. And I'm staying with the same learning method of learning more about generational differences. I am going to create a reference sheet that highlights some of the key traits of the four generations that I learned when taking the AgLearn courses. The reference cheat sheet that I will post in my office will help sustain what I have learned. And because it is not something specifically in AgLearn, but something that I will create myself, I am adding it as an external item.

Now notice here that only the activity name and the target date is required. You can leave the other fields blank. You enter the activity name that you manually type in. Mine is to include a one-page reference that includes the traits of the four generations or whatever your activity name is. You then select the target date using the calendar icon.

And then click Save. Remember that your target date for your activity cannot be past the target date for goal. That's why I suggested making all of your goal target dates and all of your activity target dates the very last day of the fiscal year so that you don’t get any error messages.

So I am done adding activities to this particular goal so I'm going to click on Save and Close.

I would like to add activities from the previous IDP that I created last year. Before I go to through the steps, I want to take a break. We are almost at the one hour mark. So let's take a 6 minute break and be back at 2:00 eastern time zone. You do not need to hang up the phone. And you do not need to log off or anything. Let’s take a 6 min. break and come back ready to go.

Okay welcome back from break and we will move on to adding goals or activities from previous IDP's. So in the previous screen I saved my previous goal. And I am taken back to my IDP main page. So I will add activities that I did not get a chance to complete last fiscal year. So from this page I click Add Goal.

This time instead of selecting a goal name and looking at the steps that we did before, we can click on the Goal Wizard at the top. And a new window appears. I will select Add Goals From Other Plans.

Then you will see all of the IDPs that you created in AgLearn. And the column where you see Select, click on the circle next to the IDP that you want to move activities from. And then click Next. I want to move activities from my FY2012 plan to my new plan, so I selected my FY2012 plan in the previous step. Now I can see all of the goals I created last year. For FY2014, I also want to continue to improve relationships. I click the box next to “Improve relationships” and click next. In this step all you do is select the target date. Again I recommend selecting the last day of the fiscal year. And remember to use the calendar icon. Here you can see a larger screen shot of what that looks like.

Click Finish unless there are more goals that you want to add from previous IDPs. And, if you want to add more goals, you will click Save and Add Another and then repeat the last two steps. Otherwise click Finished. My new goal of improving relationships has been added to my IDP, my current IDP.

But I want to look at my activities in the goal and see which ones I want to keep and which ones I want to remove. So to do that I will click on the name “Improve relationships.” Notice that there is a caution icon next to improve relationships. You still want to click on the goal name so that the caution icon is telling you that you need to do something. That is to click on and review the activity regardless of whether you want to or not. So next we will click on Improve Relationships. And here we have two activities. We have “Act as a mentor for Kathy” and “Finish reading 21 Irrefutable Laws of Leadership.” I want to keep being a technology mentor for Kathy and remove finish reading 21 irrefutable laws of leadership. Let’s see how to do that.

What you're going to do is move your mouse cursor over the activity name to finish reading 24 irrefutable laws of leadership. You don't click, just move your mouse over it and this little yellow box will come up with three options. One of which is Remove Activity. I want to remove this activity, so I click Remove Activity.

This is also the step that you will take when you have added AgLearn courses to your IDP if you want to read the course description. Once you have added the courses to your IDP, you move your mouse over the course name click View Item Description.

Okay. So, notice I have clicked on Remove Activity. And that particular activity is now gone.

You will need to make a selection in the required section field before moving on so that is a short-term, midterm or long term. And for this example I'm going to select midterm. And then click on Save and Close.

Now I am pretty satisfied with my IDP. And you may notice I have no more caution icons under any of the goal names. So I'm ready to submit my IDP to my supervisor for approval. So then I click on Submit for Approval.

Notice that previously my plan stated “Draft Status” and now that I have submitted it to my supervisor for approval, it has changed to “Pending Approval” status. So this means that I'm waiting for my supervisor to approve the plan. If some time has passed or let's say you made a mistake and you realize that you want to add something else, you do have the option to recall the plan before your supervisor approves or rejects it. If you look right under View Plan you will see the button that says Recall Plan. And that is how you can bring that plan back to your court.

Shortly after you submit your IDP, you will receive a copy of an e-mail that is sent to supervisor. The e-mail is not sent to you to take action. It's just a copy that is sent to your supervisor requesting the supervisor to either reject or approve your plan. This has caused some confusion in the past because the text of the letter states that the plan should be reviewed as soon as possible. And some employees think that they're being directed to do something when in fact they're not. Again it is just a copy of the message that is sent to your supervisor and your supervisor is the one to take action and you just wait to receive a message stating that your IDP has been approved or denied.

When the supervisor approves your IDP, an e-mail is generated back to you. At this time, you can go back into AgLearn. You can access your plan. You can complete activities. You can update the status. If development opportunities arise after you submit your plan and it has been approved by your supervisor, remember that you can still make changes. After you make changes however, remember to submit the plan back to your supervisor for approval.

Some common issues we have run into since the departmental directive was issued. This applies to all USDA employees except for RMA and FSA. One issue is that the employee is close to retirement and that they do not want to IDP. Or, if the employee refuses to do an IDP. The supervisor cannot force an IDP onto the employee. But there are steps, however, that the need to be taken. The employee has to take steps in AgLearn to document that they’re declining the IDP. And I have a job aid on how to do that and there is an item in the AgLearn titled “Fiscal Year 2014 Decline IDP.” If you go into AgLearn and search for “IDP” it will come up. And you click on that course and launch the content and you will be asked to give an explanation as to why you are not doing the IDP. Also make sure you read the text before signing off because it clearly states that even though you might be rejecting to do an IDP, that does not preclude you from completing any mandatory training, nor does it preclude you from the taking any training that your supervisor recommends as part of your job. So if there is a certification or training that is required for your particular position, you must complete that as well as mandatory training.

I want to reiterate a point that I made in the very beginning because it kind of seems very confusing and I can understand that because it states that the IDP are mandatory and then we are talking about opting out of doing the IDP. Again the reason IDPs are mandatory is because you as an employee have an opportunity for development and IDP serves as documentation. If you absolutely have no interest in developing yourself, and I don't recommend that, there are numerous ways. If you are an expert or if you are close to retirement even, you can still be a

mentor for someone. It may be the only item that you have on your IDP and that's okay. It does not need to have tons of items and activities. I would suggest that you put that on your IDP and submit that for approval to your supervisor. Let’s say your employee has no computer access or very limited computer access or your employee has to drive hours to a field office to have Internet connection to do mandatory trainings in AgLearn. Mandatory trainings I cannot fix. But for the IDP you can still do the paper-based IDP and just document the use of a paper-based form in AgLearn. The decline item means that you’re declining the AgLearn IDP, not necessarily the entire IDP in general. So the same instruction pertains to both of these examples and there are instructions on how to do this at the very end.

Usually I get questions around this point so I'm going to stop and see if you have any questions right now. You can type them in the chat area.

Okay. I do see questions. Say you want to get some training you had not anticipated in the middle of the year and a supervisor is okay with that. Do have to go through the motions of putting it into your IDP? Yes. I strongly suggest that. The IDP also serves as documentation and I don't know about you but I cannot always remember what I did last year, much less last week sometimes. So the IDP will show and document that you have completed the training. Another incentive of adding it your IDP is let's say you're updating a resume for a new position. Many times in job announcements you are asked to indicate what training you have completed and maybe you have forgotten about that. By going into your AgLearn IDP you can find all of the training you have completed and update your resume.

Is it possible to remove an activity from a previous IDP that was impossible to complete? I'm going to defer the question to Mark and Mark is typing an answer for you.

I believe the AgLearn administrator can remove it. Yes while Mark is typing, what you can do is ask your AgLearn Administrator to remove that item for you and then you will not get any e-mails or be annoyed by having to constantly update the status of a course that does not exist.

So again, get your AgLearn administrator to take that item off for you. I have the AgLearn Administrator contact information for you at the end as well. Any other questions up to this point? I see that folks are typing so I will just give you another minute.

Again continue to type in your questions and I am going to move on. I do have a couple of screenshots to make it even more clear what I'm talking about the decline AgLearn IDP item. So I have typed in I have decided that I want to do the paper IDP. So I will go into AgLearn and in the search field I'm going to type IDP and a bunch of things are going to appear. You do not have to scroll down very far to see to decline the AgLearn IDP -- fiscal year 2014. That is the item that you want to add if you are using a paper-based form, or if you and your supervisor have talked and both have agreed that there is no need for you to do an IDP. Then you can use this item to document that work.

You will click on decline AgLearn IDP and click on launch content. And this is maybe not the greatest screenshot but here is the statement that I want to make sure that you all read and that

you are clear on: You are required to complete mandatory training as well as anything that is required for your position, even though you are declining an IDP or using a paper-based IDP.

Here is the disclaimer in it's in its entirety. What it says here is all USDA Employees must be provided with the opportunity to identify their developmental plans for the upcoming year and to discuss those plan with their supervisor. While it is recommended that all employees take advantage of this opportunity and record their plans in AgLearn, not all employees may wish to do so. Circumstances for declining to create an online IDP should be one of the following:

• You have already submitted a paper IDP to your supervisor and have had that form approved.
• You have been offered the opportunity to create an online IDP, but you do not have any developmental goals for the upcoming year.

Because AgLearn is the official system of record of all training in USDA, it is critical that all IDP submissions be tracked in the system even though many of the plans were documented via a paper form.

A survey will appear in the employee's AgLearn To Do List which will provide you with the means to document your reason for declining an AgLearn IDP. You will be instructed to close this document window, and then complete the IDP Declination for Current Year survey to document your reason for declination. You will also be asked to confirm your understanding that the lack of an IDP does not preclude you from attending mandatory training or job-related, technical training when directed to do so.

Again, the survey will appear in your list of Course Evaluations/To Do List.

Completion of the IDP acknowledges the employee's commitment to accomplish the planned goals and activities. To implement the plan effectively, three actions are required on the employee's part. Has to a live process – our situation and role changes often – what was good at the beginning of the year, may not be valid as the year goes on. Is the context/environment still the same?

Document - Formal training and developmental activities that involve exchange of funds, official time or both must be documented.

Participate - Once the request for the learning activity is approved, it is up to the employee to carry through with the experience. The supervisor will support and guide the employee, but the primary responsibility for successfully reaching those goals rests with the employee.

Evaluate - Just taking a course or being involved in a development assignment does not necessarily mean the employee has fulfilled his/her commitment. The crucial step is applying what is learned to the job and practicing it. After each development activity, the supervisor and employee should meet and discuss the development experience and lessons learned and how those lessons can be applied in the employee's work.

The supervisor should periodically reassess the employee's plan and make adjustments if necessary with the employee. An IDP is not a contract set in stone. IDPs should be reviewed, revised or both at progress reviews of the performance plans, upon completion of a development activity, and altered as performance plans and job assignments change.

The supervisor should also document how the IDP has resulted in changes to the employee's performance.

Contribute - Put knowledge to use quickly. New skills decay rapidly if they are not immediately put to use. The need for the manager and the subordinate to conduct a post-program assessment is obvious (but often ignored). The manager who schedules a twenty-minute post-session briefing or requires a one-page bullet-item summary of key points learned (and, more important, actions to be taken based on the program) will not only maximize the dollars spent on training but significantly increase the probability that real development will occur. To maximize training's effectiveness, good managers require the individual to teach the main points, key concepts, or critical techniques to a group of colleagues immediately upon return. Sharing the learning maximizes the investment that the organization makes in the individual.

What challenges do encounter on following up on IDP? Money, time, prioritizing or engagement? Other?

Time and money are the biggest ones, no surprise there. And this is pretty tough. Especially as we get into our routines. In completing our day-to-day activities. Supervisors, remember to visit with your employees. Put the planned activity on a calendar immediately to have a better idea and a better chance of getting it done. If you have a virtual team or a team that is not located in the same location as you, plan visits to the units with face-to-face time to check in on the IDP if you can. We have a lot of technology that we can use nowadays. You can use WebCam to make it more personable. This is just one suggestion.

Remember that creating a useful IDP, pulling good learning from the developmental activities, and applying that learning in the workplace are meant to happen through ongoing dialogue between a supervisor and an employee – with each carrying out the various responsibilities we've addressed in our webinar today. Remember to be sure to schedule periodic check in conversations between employee and supervisor, and know that you will get different degrees of engagement. Take into account different learning styles, personality preferences, and prior experiences. Keep your eye on the goal of good development conversations over time

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As a reminder, explore rather than react. Listen, paraphrase, and then share. Provide advice or ideas that you may not have.

So we have covered a lot of ground today. We talked about with the IDP is. Why the directive exists; what was put into place. Why it is important to create one. What one looks like. How to fill out key sections in the AgLearn IDP and how to hold effective discussions. We hope you have got at least one nugget of information and hopefully more as you move ahead with planning

your IDP or just assisting your employees with their development for both personal and organizational success.

Here are the training contacts in particular for the AMS employees. And so any training questions you can contact them. And if you remember me because I deliver this webinar certainly I will not turn you down so free to contact me as well. Do we have any questions? Yes. You are anxious to get your handouts I see so let's move on to the screen. You will see handouts and I have the actual departmental directive available, step-by-step instructions on how to complete your IDP in AgLearn, the slide handouts which is the presentation that I had today, the job aid on how to change your supervisor in AgLearn, and adding goals from expired plans or adding goals from previous plans. I have the actual paper-based form that you need to be using which is the AD-881 form.

And then, the instructions for recording the use of a paper-based form or declining the IDP in AgLearn. You may need to scroll down to see all of them. What you need to do is click on each one and select download file and look at the bottom and if you see the flashing E click on that and you will be prompted to download each file. Under the handouts we have the AgLearn Administrator contact. The telephone number is 202-720-1111. And the e-mail address for your AgLearn administrator is AMSservicedesk@ams.usda.gov. So we have a tip here: we can actually highlight all of the handouts and downloaded them as a zip file. If you're having any trouble, make sure that your pop-up blocker is turned off. To do that to go to Internet Options. And if you're still trying and trying and it is not working, please send me an e-mail. I will type my e-mail into the chat area now.

If you cannot download the files, e-mail me and I will send them to you.

Again if you cannot download them, you can e-mail me and I will send them to you. I also have the link to the AMS training page here.

In order for you to receive credit for attending today, we will look at the attendee list. And for those of you who have your first and last name in there, you do not need to take any action and we will get you credit for attending today. But if your full name is not listed or if you just listed your first name or an initial or if you did not list your name at all, and if you want to receive credit for attending, please send an e-mail to the e-mail you see on the screen the. With the subject line of credit for IDP AMS webinar January 30, 2014.

Okay. I am still available to answer any questions that you might have. But if you have everything that you need and your ready to go, this does conclude our webinar for today. I will again stay online to answer any questions. If you have coworkers are colleagues or employees there were not able to attend today, the webinar was recorded and we will share the links with Nichole project and I'll ask Nichole to send it out to anyone that may need it and so you guys can view this webinar again or share with your colleagues. Thank you so much and I hope that you have gotten a little bit of information today on the value of an IDP and a little bit more comfortable with how to do them in AgLearn.