

Individual Development Plan Agreement

Identifying Goals and Strategies for Professional Development

Employee's Name:

The completion of this form acknowledges that both the manager and employee have met, discussed, and agreed upon the appropriate development activities to enhance selected financial competencies.

Using the IDP Employee Worksheets, write the specific development activity that will occur on the Action Items portion of this form. Use the **SMART** approach to help articulate a clear and measurable action. (**SMART**: specific, measurable, attainable, realistic and timely)

IDP Action Items (to be completed by the Employee):

Goal:	
<p>Strategies to Enhance Financial Competency: <i>Examples include: on-the-job training activities, mentoring, job-shadowing, courses through OE, Regents Scholarship courses, coaching, self-development. There may be multiple activities to achieve a single goal.</i></p>	<p>Core Competencies:</p> <ul style="list-style-type: none"> <input type="checkbox"/> Functional/Technical Skills <input type="checkbox"/> Analytical Thinking <input type="checkbox"/> Critical Thinking <input type="checkbox"/> Problem Solving/ Decision Making <input type="checkbox"/> Communication <input type="checkbox"/> Time Management <input type="checkbox"/> Integrity <input type="checkbox"/> Accuracy/Attention to Detail <input type="checkbox"/> Understands U Context <p>Optional Competencies:</p> <ul style="list-style-type: none"> <input type="checkbox"/> Influence/Negotiation <input type="checkbox"/> Service <p>Optional - Supervisors:</p> <ul style="list-style-type: none"> <input type="checkbox"/> Staff Management <input type="checkbox"/> Strategic Planning
Action Steps:	Timeline for Completion:

Goal:	
<p>Strategies to Enhance Financial Competency: <i>Examples include: on-the-job training activities, mentoring, job-shadowing, courses through OE, Regents Scholarship courses, coaching, self-development. There may be multiple activities to achieve a single goal.</i></p>	<p>Core Competencies:</p> <ul style="list-style-type: none"> <input type="checkbox"/> Functional/Technical Skills <input type="checkbox"/> Analytical Thinking <input type="checkbox"/> Critical Thinking <input type="checkbox"/> Problem Solving/ Decision Making <input type="checkbox"/> Communication <input type="checkbox"/> Time Management <input type="checkbox"/> Integrity <input type="checkbox"/> Accuracy/Attention to Detail <input type="checkbox"/> Understands U Context <p>Optional Competencies:</p> <ul style="list-style-type: none"> <input type="checkbox"/> Influence/Negotiation <input type="checkbox"/> Service <p>Optional - Supervisors:</p> <ul style="list-style-type: none"> <input type="checkbox"/> Staff Management <input type="checkbox"/> Strategic Planning
Action Steps:	Timeline for Completion:

 Employee's Signature Date

 Manager's or Supervisor's Signature Date