

Individual Development Planning (IDP)

Module: Coaches and Mentors

Course Objectives

At the end of this course, you will be able to:

- Discuss your role in the IDP process
- Assist mentees in developing IDPs
- Log into SATERN and view mentees IDPs

Individual Development Planning in SATERN

- In addition to current capabilities available in SATERN to manage NASA training activities, employees can access the IDP tool to document career goals and development activities to reach each goal.
- Individual Development Planning (IDP) in SATERN provides automated functionality for mentors such as:
 - Online access to mentee's IDP
 - Electronic IDP feedback process

Individual Development Planning in SATERN

- As a mentor or coach at NASA, you serve in an important role. Mentees and coachees will want to discuss their development plans with you and use you as a sounding board and advisor.

The Agency acknowledges a distinction between the role of mentors and coaches. For the purpose of this IDP presentation, we will use the term mentor to refer to both mentors and coaches. Similarly, the term mentee will refer to both mentees and coachees.

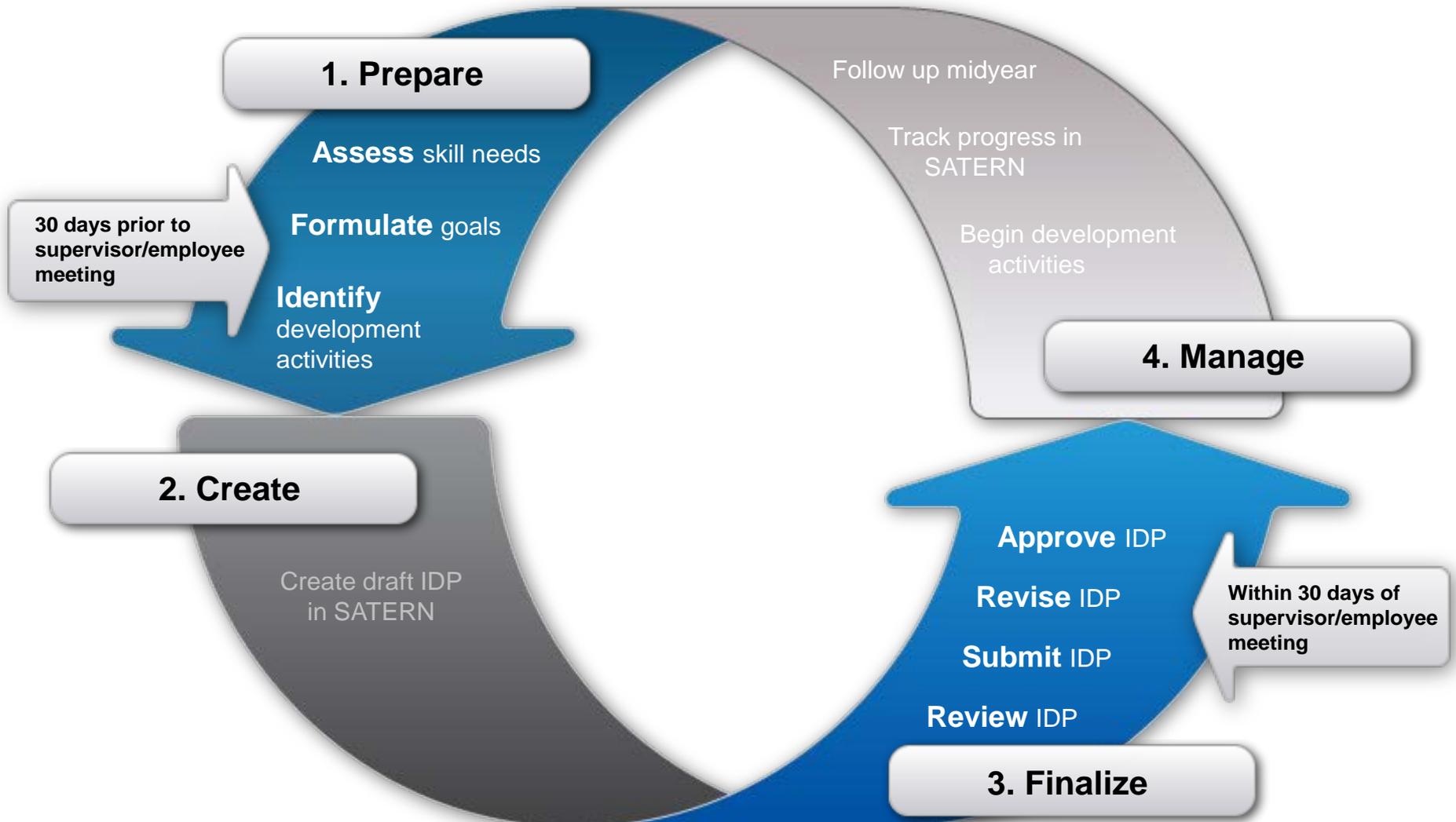
Mentor Role in the IDP Process

- The type of assistance that an employee requires during the IDP process is determined through formal or informal discussions with the mentor.
 - The mentor and the mentee should agree in advance about what support is being requested and the timeframe for the support.
- The Individual Development Planning process is comprised of four phases: Prepare, Create, Finalize and Manage.

Mentor Role in the IDP Process (cont.)

- Mentors play a role in two of the four phases:
 - Phase 1: Prepare for IDP
 - Evaluate skill gaps and development needs
 - Identify training resources and developmental activities
 - Phase 3: Finalize IDP
 - Provide feedback on the draft IDP

IDP Process Phases



Prepare Phase Activities

- The Individual Development Planning process begins with planning and preparation. In the first phase of the IDP process, you will assist your mentee as he/she prepares to create his/her plan.
- When the mentee is in the process of preparing for the IDP, the mentor may be called upon to assist with the following:
 - Assessment of skill needs
 - Assistance with goal setting
 - Assistance identifying appropriate development activities

Prepare Phase Activities (cont.)

- As a mentor, you may be asked to provide the mentee with advice and counsel to help him/her determine career goals and how to reach them.
- Your role in encouraging and motivating the mentee can help him/her grow personally and professionally.

Prepare Phase Activities (cont.)

- Actions you can take with your mentee:
 - Provide direction and guidance regarding goal setting and researching development activities
 - Share thoughts and ideas as well as any useful contacts
 - Demonstrate openness and provide candid feedback about perceived strengths and developmental needs
 - Coach the employee in enhancing skills and help clarify career goals
 - Share organizational information (e.g., culture, politics, structure)
 - Help the employee think strategically and link him/her with others who can enhance his/her learning

In the second phase, **Create**, the mentee will use the information from the **Prepare** phase to create a draft IDP in SATERN.

Finalize Phase Activities

After the IDP is created and before it is finalized, you may be asked to review and comment on the draft plan that the mentee has created in SATERN.

Finalize Phase Activities (cont.)

The mentor and mentee should discuss and agree on the following:

Feedback Format - How should feedback be provided?

- Note comments in the online IDP tool
- Write comments on a printed draft
- Hold in-person meeting or phone conference

Target Dates - When is the feedback expected?

- The date the draft IDP will be ready for review
- The target date for mentor comments

Development activities are not limited to formal training or activities requiring an Agency expenditure of funds.

Finalize Phase Activities (cont.)

- If you and your mentee have agreed that you will review the IDP online in SATERN, you should be aware that SATERN provides limited email notifications or alerts for coach/mentor functionality.
- Mentors are **not** alerted when an IDP is ready for review in SATERN, but the mentee receives an e-mail message when the mentor has made comments.
 - The mentee should notify the mentor when they are ready for their review.
- The following slides will walk you through the process of reviewing the IDP in SATERN, specifically how to:
 - Select an IDP for Review
 - View Plan Details
 - Make Comments

Select an IDP for Review

- To review a draft IDP, log in to SATERN and navigate to the Learner tab.
- Click the **Individual Development Plan(s)** link in the Easy Links section
- Alternatively, you will find the **IDP Goals Pod** on the Learner tab, under the Easy Links section.

The screenshot displays the SATERN interface. At the top, there is a search bar labeled 'Catalog'. Below it is the 'Easy Links' section, which contains a grid of links. The link 'Individual Development Plan(s)' is circled in red. Below the 'Easy Links' section are four pods: 'Curricula', 'Learning History', 'Competencies', and 'IDP Goals'. The 'IDP Goals' pod is also circled in red. The 'IDP Goals' pod shows a progress indicator with three categories: Complete (0%), In Progress (0%), and Behind (100%).

Category	Count
Overdue	1
Due in 30 days	0
Due Later	0

Category	Percentage
Complete	0%
In Progress	0%
Behind	100%

Select an IDP for Review

In addition to your own IDP/s, you should also see an option to **View Other Learner's Plans**.

My IDPs Workspace

Goal Status

- Complete (0.00%)
- In Progress (0.00%)
- Behind (100.00%)

IDP Alerts
Changes to the IDP(s) require appr...

IDP Links

- Create IDP
- Add Goal
- View Published Goals
- View Other Learner's My Goal workspace**

Select IDP: All Active IDPs Edit Display

Goal Name	IDP Name	IDP Status	Target Date
Jim Goal A for 2012	Jim IDP for 2012	Approved	7/31/2012
Systems Engineering	My IDP	Approved	8/24/2012
Systems Engineering	test	Pending Approval	12/14/2012

Click **View Other Learner's My Goal workspace**.

Select an IDP for Review (cont.)

- The **View Mentee's Goals workspace** page will list the development plans to which you have been granted access.
- Click the name of the mentee to view the IDP and add comments.

View Mentee's Goals workspace

Select from the list of mentees below to view their goals workspace

SHARI A HOWER

Click your mentee's name

Complete (0.00%)
In Progress (0.00%)
Behind (100.00%)

View Plan Details

To see the details for a specific plan, click the **Select IDP** drop down and select the plan you wish to view.

Behind (100.00%)

Select IDP: All Active IDPs

Goal Name All Active IDPs

Objective June 2012 (Draft)

Systems Engineering Consulting

1 Click the **Select IDP** drop down.

2 Select a plan.

View Plan Details (cont.)

To see the development activities listed for specific goals of a plan, click the goal name.

SHARI A HOWER
OFFICE OF HUMAN CAPITAL MANAGEMENT

My IDPs Workspace

Goal Status

- Complete (0.00%)
- In Progress (0.00%)
- Behind (100.00%)

IDP Alerts
Changes to the IDP(s) require approval

Select IDP: June 2012 (Draft) [Edit Display](#)

[Submit for Approval](#) **Changes to the IDP requires approval** [Hide IDP Details](#)

Create IDP → Create Goals → Submit for Approval

Status: Draft
IDP Type: Development
Description:
IDP Period: (Performance Year 2013 (1 Year)) 5/1/2012 to 4/30/2013

[Edit IDP](#)
[Add/Edit IDP Notes](#)
[Add Goal](#)
[Print IDP](#)
[View Changes Log](#)
[Delete IDP](#)

Goal Name	IDP Name	IDP Status	Target Date
 Objective 1	June 2012	Draft	10/16/2012

Click the goal name

View Plan Details (cont.)

- View the development activities for the goal.
- To see more details of the activity, click the activity name.

The screenshot shows the 'Edit Goal' window for 'June 2012 (Development)'. The goal name is 'Objective 1'. The description field is empty. The priority is set to a dropdown menu. The start date is empty, and the target date is '10/16/2012'. The section is set to a dropdown menu. The status is 'No Value' with a checkbox for 'Manually override status'. The target and actual fields are empty. Below the goal details is a table of activities. The table has columns for 'Activity Name', 'Status', and 'Target'. The first row shows 'Activity 1' with a status of 'Not Started' and a target of '10/16/2012'. A green callout box points to the 'Activity 1' link in the table with the text 'Click the activity name'. Another green callout box points to the 'Close' button at the bottom right of the window with the text 'After viewing activities, click Close'. The 'Close' button is circled in red.

Activity Name	Status	Target
Activity 1	Not Started	10/16/2012

Make Comments

Once you have viewed the IDP, you can add comments to the overall IDP, and/or to Goals and Activities.

- To add notes to the overall IDP - from the IDP workspace click [Add/Edit IDP Notes](#)

Training Development for MEREDITH LOWERY

Approve Deny Edit Display

Status: Pending Approval

IDP Type: Development

Description:

IDP Period: (Performance Year 2013 (1 Year)) 5/1/2012 to 4/30/2013

Hide IDP Details

Click [Add/Edit IDP Notes.](#)

[Add/Edit IDP Notes](#)

[Print IDP](#)

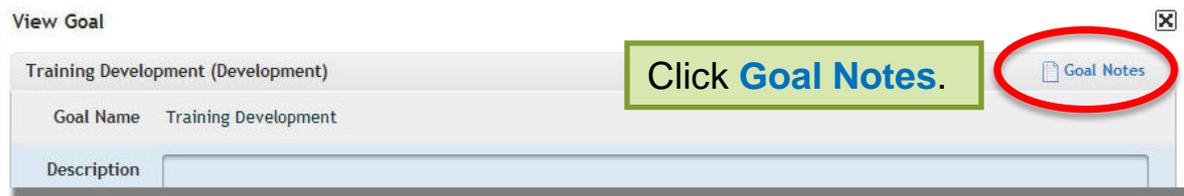
[View Changes Log](#)

[View IDP Approval log](#)

Goal Name	IDP Name	IDP Status	Target Date	Goal Status
Training Developm...	Training Development	Pending Approval	1/4/2013	No Value

Make Comments (cont.)

- To add notes to a Goal - from the **View Goal** screen, click **Goal Notes**



- To add notes to an Activity - from the **View Activity** screen, click **Activity Notes**



Make Comments (cont.)

- The Notes Log allows you to view any comments that have already been added.
 - Notes can be made by the employee, supervisor, or by a coach/mentor.
- To add your comments, type the text in the box provided and click **Add**.
 - If you choose not to add notes, you can exit by clicking Cancel at the bottom of the screen.
- If you wish to remove the note, click the **Delete** (✖) icon
- Once you are finished, click **Done**.

Goal Notes

Type below and click Add to add a note to a single Learner.

B I U ☰

Enter comments.

Private note (for yourself only)

Click **Add**.

1

Add

Notes Log

✖ James S Mitchell	6/26/2012	11:43 AM
This is a good goal		

View comments.

Click **Done**.

2

Done Cancel

Checking **Private note (for yourself only)** will ensure that others with access to this plan cannot view your notes (including your mentee), but they are recorded in the system are not truly “private.”

Make Comments (cont.)

You must click **Save and Close** for your changes to save properly.

Edit Goal

My IDP (Development) Goal Notes

Goal Name * System Engineering

Description

Priority Start Date Target Date * 6/28/2013

Section

Status Target Actual

Activities Create New Activity

Activity Name	Status	Target Date
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Click Save and Close.

Summary

- A coach or mentor may be asked for assistance in the **Prepare** and **Finalize** phases of the IDP process.
- New functionality in SATERN allows the mentor to view IDP details and provide online feedback on a mentee's IDP.
- It is important to discuss what assistance the mentee requires and to establish agreement on the timeline and method for feedback. The mentor does not receive email notifications.
- Additional information can be found at <https://saterninfo.nasa.gov> > IDP Information