

CF OPERATING PROCEDURE
NO. 60-35, Chapter 1

STATE OF FLORIDA
DEPARTMENT OF
CHILDREN AND FAMILIES
TALLAHASSEE, February 13, 2018

Human Resources

PERFORMANCE EVALUATION PROGRAM FOR CAREER SERVICE,
SELECTED EXEMPT SERVICE, AND SENIOR MANAGEMENT SERVICE EMPLOYEES

1-1. Purpose. This operating procedure implements the Performance Evaluation Program within the Department of Children and Families (Department) for Career Service, Selected Exempt Service (SES), and Senior Management Service (SMS) employees.

1-2. Scope. This operating procedure applies to all Department staff involved in the Performance Evaluation Program.

1-3. References.

- a. Chapter 110, Part II, Career Service System, Florida Statutes (F.S.).
- b. Chapter 110, Part III, Senior Management Service System, F.S.
- c. Chapter 110, Part V, Selected Exempt Service System, F.S.
- d. Chapter 60L-35, Performance Evaluation System, Florida Administrative Code (F.A.C.).

1-4. General. The Performance Evaluation Program is the basis for evaluating and improving the job performance of Department employees. This Program enables employees to receive feedback concerning performance of assigned duties and responsibilities. It informs employees of their strengths and areas of needed improvement in job performance, identifies current and future training needs, and provides documentation for awarding discretionary merit increases, and lump-sum bonuses in accordance with section 110.1245(2), F.S.

1-5. Definitions. The following information is provided to clarify terms that are used throughout this operating procedure.

a. Annual Evaluation Date. July 1, which begins the 60-day period (July 1 through August 29) within which annual performance evaluations shall be completed.

b. Evaluation Period. The period of time covered by the performance evaluation.

c. Overall Rating. The employee's level of performance for the evaluation period, which is derived as follows:

(1) Calculated by the People First System which is the average of all of the individually-rated performance expectations.

This operating procedure supersedes CFOP 60-35, Chapter 1, dated June 1, 2010.

OPR: ASHR

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(2) Overall Rating Scale.

OVERALL RATING SCALE

Numeric Range	Overall Rating
4.50 - 5.00	Outstanding
3.50 - 4.49	Commendable
3.00 - 3.49	Satisfactory
2.50 – 2.99	Needs Improvement
2.49 and below	Unsatisfactory

d. Performance Evaluation. A written assessment of an employee's performance of assigned duties and responsibilities as reflected in the employee's performance expectations and documented on a performance evaluation form. The types of performance evaluations are:

(1) Annual Performance Evaluations. Completed during the 60-day period, July 1 through August 29. The Department strives to complete all annual performance evaluations within 30 days following the due date of July 1.

(2) Probationary Performance Evaluations. Career Service employees who are appointed with probationary status and are required to serve at least a one-year probationary period shall be placed on a probationary performance plan that begins the calendar month in which they are placed in probationary status. The rater shall complete a probationary evaluation within 30 days prior to the end of the probationary period.

(3) Close-Out Evaluation. See paragraph 1-6g below for information on close-out evaluations.

e. Performance Expectation. A statement that describes satisfactory performance of an essential duty or responsibility as listed in the position description or satisfactory demonstration of an attribute or value that the Department deems necessary for the accomplishment of its core missions. A stated measure of the level of performance the employee is expected to achieve or the objective the employee is expected to accomplish. Performance expectations refer to ongoing performance criteria that must be met repeatedly and are usually expressed quantitatively and are measured by quality, quantity, or timeliness. A performance expectation describes fully satisfactory performance.

f. Performance Plan. A plan prepared by the rater that identifies the performance expectations by which the employee will be evaluated during the next evaluation period. The performance expectations are established in the People First System.

g. Rater or Supervisor. The employee's current immediate supervisor or a designated managerial employee who has knowledge of the employee's duties, responsibilities, and job performance.

h. Second-Level Review. Conducted by the rater's supervisor after the rater has assessed the employee's performance.

i. Individual Development Plan (IDP) (form CF 736, available in DCF Forms). A written plan of action outside of the People First System for developing knowledge, skills, and abilities that are needed to meet specific career goals. An IDP is created by the supervisor and employee to further an employee's career goals and meet future talent needs.

1-6. Policy.

a. All Career Service employees must successfully complete a one (1) year probationary period in his/her current position. Probationary periods shall not be extended except in extraordinary circumstances and approved by Human Resources.

b. At a minimum, each employee shall receive a performance evaluation each calendar year.

c. The Performance and Talent Management Module in the People First System shall be used for all Performance Planning and Evaluations.

d. Employees with an overall rating of either "Needs Improvement" (2.50 – 2.99) or "Unsatisfactory" (2.49 and below) on their performance evaluation shall be considered to have not met their performance expectations for the position during that evaluation period. If such an employee is to be retained in their position, the rater must timely notify the employee in writing of the performance expectation deficiencies and the corrective action to be taken to bring the employee's overall performance to a satisfactory level, in accordance with paragraph 1-10, Performance Expectation Deficiencies, of this operating procedure.

e. Nothing in this operating procedure limits the ability of the Department to take disciplinary action in accordance with Chapter 60L-36, F.A.C.

f. Probationary Performance Evaluations.

(1) Career Service employees in probationary status shall have a Probationary Performance Evaluation completed no more than 30 days prior to the end of the probationary period. Failure to evaluate the probationary employee on or before the end of the probationary period will result in the employee successfully completing the probationary period.

(2) Where an employee successfully completes his or her probationary period and the ending date of the probationary period is within 60 calendar days of the Annual Evaluation, the supervisor should rate the employee as "N" on the annual evaluation and include a comment that the completed probationary evaluation overall rating shall become the employee's overall rating for the annual evaluation period.

g. Close-Out Evaluations.

(1) Promotion, Demotion, Reassignment, or Original Appointment. A close-out evaluation shall be conducted in these instances. The rater shall assess employee performance and give a rating for each individual expectation. Once the evaluation is completed, the employee shall receive new expectations and be placed in the current evaluation period for the remainder of the period. If at any time a rater feels there has not been enough time to assess employee performance, a rating of an "N – None given" may be given.

(2) Lateral. Lateral action appointments entail moving to positions with duties and responsibilities that are substantially the same. It is left to the agency's discretion as to whether a close-out evaluation is required.

(3) Significant Change in Duties. Any time there are significant changes to the duties and responsibilities of a position that require new expectations to be established, the rater shall close out the current employee evaluation, giving each expectation a rating, and then create new expectations and communicate such expectations to the employee.

(4) Change in Agency. Any time an employee leaves one agency for another, the rater shall assess performance and complete an evaluation on the departing employee prior to the last day worked. The employee will systematically be placed in the current evaluation plan at the new agency and the new rater shall create new expectations for the remainder of the evaluation period.

(5) Administrative Close-Out. When the rater misses the 60-day deadline to complete the annual evaluation process, the People First system will automatically close out the evaluation in accordance with the rule.

(6) Change in Supervisor. A close-out evaluation is not required when there is a change in supervisor if the duties and responsibilities remain the same. The departing supervisor should provide evaluation information prior to the last day of work in order to provide accurate input regarding employee performance for a new supervisor. The departing supervisor should capture scores and comments for individual expectations and may also provide information in the Manager's Notepad. This information will be visible to the new supervisor who, at the end of the evaluation period, will have it for reference in completing the evaluation.

1-7. Roles and Responsibilities.

a. The Performance Evaluation Program involves Department managers, the Employee Relations and Performance Management Center of Excellence, supervisors, and employees in a systematic process that aligns individual performance with the Department's goals.

b. Roles and Responsibilities are identified in each section of this operating procedure.

1-8. Performance Planning.

a. Upon original appointment, promotion, demotion, or reassignment to a position with significantly different job duties or responsibilities, and at the beginning of each annual evaluation period, the rater shall timely conduct an oral performance planning session with the employee.

b. At the beginning of the review period, the supervisor shall conduct a performance planning session with the employee to identify the performance expectations by which an employee shall be evaluated and to review the performance expectations and rating scale. The supervisor shall discuss with the employee how their work performance contributes to the work unit and the overall vision, mission, and guiding principles of the Department. The rater shall also provide an opportunity for employee feedback regarding what is expected of the employee in the position.

c. The supervisor will ensure that the position description is current and accurately reflects the duties and responsibilities of the position and will review the position description with the employee.

d. The Performance Planning expectations shall be acknowledged by the employee indicating that the performance expectations and up-to-date position description have been discussed. In the event an employee refuses or is unavailable to acknowledge the performance expectations, the rater shall acknowledge on behalf of the employee with comments that the employee refused or is unavailable to acknowledge.

e. Roles and Responsibilities of the Employee.

(1) Know and understand their job duties and what they must do to achieve the performance expectations set forth on the performance expectation plan.

(2) Strive to perform at the highest level of efficiency and effectiveness; for example, organize work; stay focused on job related activities; provide the level of effort necessary to get the job

done; demonstrate willingness and ability to make decisions and exercise sound judgment; produce work that consistently meets or is above expectations; and be committed to improving individual performance.

(3) Be courteous, considerate, respectful, and prompt in dealing with and serving the public and coworkers.

f. Roles and Responsibilities of the Supervisor (Rater).

(1) Review the position description for each position supervised to ensure that it is current and accurately reflects the duties and responsibilities assigned to the position. Based on the position description, develop performance expectations for each position using the SMART (Specific, Measureable, Achievable, Relevant, and Time Bound) methodology. Performance expectations are not intended to account for all work assignments, only those identified as most critical or significant to the position.

(2) Upon initial employment and at the beginning of a review period, provide employees with a current up-to-date position description and performance plan that includes performance expectations established in the People First System.

(3) Provide feedback to employees throughout the review period and clearly explain the goals and objectives of the unit in relation to the Department's mission.

(4) Provide employees with coaching and meaningful feedback regarding job performance.

(5) Conduct one-on-one meetings with employees throughout the evaluation period to discuss performance, identify strengths and opportunities for improvement and development.

(6) Timely inform their employees verbally and in writing of performance expectation deficiencies and the necessary corrective action to be taken prior to the end of the evaluation period, in accordance with paragraph 1-10, Performance Expectation Deficiencies, of this operating procedure.

(7) Meet in person with employees, when possible, for performance planning and performance evaluation.

g. Roles and Responsibilities of Management.

(1) Assistant Secretaries, Regional Managing Directors, and Hospital Administrators will ensure that supervisors and managers in their respective organizational units conduct accurate and timely performance evaluations and receive training on the Performance Evaluation Program by the Employee Relations and Performance Management Center of Excellence.

(2) Ensure that supervisors develop appropriate performance expectations for their employees based on the duties and responsibilities included in their position description.

(3) The reviewing authority (next higher level supervisor) will review the performance evaluation to ensure appropriateness, fairness, continuity, and consistency in application.

h. Roles and Responsibilities of the Servicing Employee Relations and Performance Management Center of Excellence.

(1) Establish for the organizational unit serviced, a formal process, to include a Corrective Action Plan (CAP) form (see paragraph 1-10 of this operating procedure), to be used by

supervisors and managers in consultation with the servicing employee relations representative, to inform their employees verbally and in writing of performance expectation deficiencies that could result in an overall rating of “Needs Improvement” or “Unsatisfactory” and the necessary corrective action to be taken prior to the end of the evaluation period.

(2) Monitor the performance evaluation program within their respective organizational units.

(3) Provide technical assistance and training.

1-9. Performance Evaluations.

a. In completing a performance evaluation, the rater shall include:

(1) A rating of the employee’s job performance during the evaluation period for each performance expectation identified in the performance plan. Each performance expectation shall be measured using the following scale:

INDIVIDUAL PERFORMANCE EXPECTATIONS RATING SCALE		
RATING	NUMERIC SCALE	DEFINITION AND EXAMPLES
Exceptional	5	Employee consistently exceeds the performance expectation of the position. Examples include, but are not limited to: The employee requires little or no supervision from management in accomplishing his/her tasks and seeks opportunities to enhance the organization. The employee possesses highly advanced job knowledge. The employee is relied upon to solve complex problems and applies creativity and innovative approaches in formulating solutions.
Above Expectation	4	Employee consistently meets and often exceeds the performance expectation of the position. Examples include, but are not limited to: The employee requires minimal supervision from management in accomplishing his/her tasks. The employee possesses a thorough knowledge of the job, and often solves or assists in solving complex problems.
Meets Expectation	3	Employee consistently meets and may occasionally exceed the performance expectation of the position. Examples include, but are not limited to: The employee requires moderate supervision from management in accomplishing his/her tasks. The employee possesses sufficient knowledge and/or initiative to execute his/her duties and responsibilities.
Below Expectation	2	Employee exhibits inconsistent job performance, but has the capacity to improve to meet the performance expectation of the position. Examples include, but are not limited to: At times the employee requires close supervision where he/she should be operating on his/her own. The employee sometimes lacks the initiative, and/or job knowledge to execute his/her duties and responsibilities.

Unacceptable	1	Employee consistently fails to meet the designated performance expectation. Examples include, but are not limited to: The employee requires close supervision and his/her work requires continual correction. The employee's job knowledge is insufficient to meet daily requirements.
N	None Given	No longer applicable or unable to determine.

(2) Comments relating to the employee's job performance for each performance expectation rating of "Exceptional" and "Above Expectation."

(3) Comments relating to the employee's job performance for each performance expectation rating of "Below Expectation" and "Unacceptable," as well as prescribed developmental activities and corrective action(s) for areas where improvement is required.

(4) The overall rating of the employee's job performance during the evaluation period, which shall not be adjusted or affected by the ratings of any other employees being rated.

b. The rating supervisor must discuss the evaluation with the next level supervisor and both will acknowledge prior to giving the final review to the employee. The reviewing authority will assess the evaluation for technical sufficiency and ensure the evaluation form does not cover factors other than work performance, and provide additional comments, if necessary.

c. A performance evaluation is considered to be complete when it has been discussed with the employee and the employee has acknowledged or refused to acknowledge the evaluation. Once completed, performance evaluations shall not be changed by a higher level authority.

d. The employee's acknowledgement shall indicate only that the employee's job performance has been discussed with the employee and does not imply that the employee agrees or disagrees with the rater's assessment of his/her performance. The employee may make written comments to the performance evaluation in response to the evaluation. In the event an employee refuses to acknowledge or is unavailable, the rater shall acknowledge on behalf of the employee and indicate the employee's refusal or unavailability to acknowledge.

e. Roles and Responsibilities of the Employee.

(1) Meet with their supervisor to discuss their job performance.

(2) Acknowledge the Performance Evaluation Plan to indicate their supervisor has discussed their job performance with them.

f. Roles and Responsibilities of the Supervisor (Rater).

(1) Timely prepare the employee's performance evaluation and discuss it with the reviewing authority.

(2) Electronically submit a copy of the performance evaluation to the employee.

(3) Meet in person, when possible, to discuss performance evaluation with the employee.

g. Roles and Responsibilities of the Reviewing Authority.

(1) Review the evaluation plan for compliance with technical requirements, appropriateness, fairness, and consistency in application.

(2) Acknowledge the evaluation plan and provide additional comments, if necessary.

h. Roles and Responsibilities of the Servicing Employee Relations Representative. Monitor the performance evaluation program, and provide technical assistance and training.

1-10. Performance Expectation Deficiencies.

a. Throughout the evaluation period, raters should observe employee performance and discuss any performance concerns with the employee as soon as possible.

b. The rater is responsible for timely informing his or her employees in writing, e.g., documented coaching or a Corrective Action Plan (CAP), of performance expectation deficiencies that could result in a “Below Expectation” or “Unacceptable” rating on their next performance evaluation and the necessary corrective action to be taken prior to the end of the evaluation period. If a supervisor fails to timely inform an employee of the employee’s performance deficiencies and allow for subsequent corrective action, the employee cannot be rated below “Meets Expectation.”

c. An electronic CAP in the Performance and Talent Management module in the People First System must be completed when an employee's overall rating falls below satisfactory and the deficiencies have previously been verbally discussed with the employee. The rater shall identify the specific deficiencies and corrective action necessary for the employee to attain satisfactory performance. NOTE: Corrective Action Plans are all electronic now and you must consult with your servicing employee relations representative for the plan to be set up.

d. A CAP may be completed when an employee falls below satisfactory in one expectation.

e. A CAP must include a time period for completion of the CAP, based on the duties and responsibilities assigned the position. The employee may be removed from the position at any time if adequate improvement is not made in accordance with the CAP.

f. The rater shall consult with their manager and the servicing employee relations representative prior to discussing the CAP with the employee.

g. At the end of the CAP period, the rater is responsible for meeting with the employee to discuss the employee’s efforts to improve performance to a satisfactory level and close out the electronic CAP. If the employee has not achieved satisfactory performance, the rater shall consult with the servicing employee relations representative to determine if the employee should be retained in the position.

h. The employee's acknowledgement of the plan indicates that the CAP has been discussed and does not imply that the employee agrees or disagrees with the Plan.

i. For purpose of the performance evaluations, the completed electronic record that is stored in People First will serve as the master copy of the official performance evaluation. This electronic record will be considered part of the official personnel file.

1-11. Individual Development Plan (IDP) (form CF 736, available in DCF Forms).

a. The IDP provides employees with the voluntary opportunity to organize and set their priorities for learning and development experiences that will assist them to:

- (1) Improve performance in their current work assignment;
- (2) Obtain knowledge and experience needed for increased responsibility in their current work assignment;
- (3) Obtain knowledge and experience that may increase their chances for career advancement opportunities; and,
- (4) Develop knowledge, skills, abilities, and leadership qualities required for a key leadership position.

b. Concurrent with the annual performance evaluation, an employee may request their supervisor's assistance in completing an IDP (form CF 736, available in DCF Forms).

c. When requested by an employee, the employee's supervisor shall cooperate in completing an IDP in accordance with the IDP Instructions. The IDP will be kept in the department file with a copy to the employee. IDPs are not to be used against an employee when making decisions for promotion and are not to be used in lieu of required corrective action.

d. An employee's completion of an IDP does not guarantee nor otherwise imply they will have a pre-determined advantage or be given preference over other candidates for a promotion or training opportunity.

e. Employees must consult with their supervisor to determine if any individual development activity will be considered work time.

f. To preclude individual development activity from being counted as compensable work time the following four criteria must be met:

- (1) Attendance must occur outside the employee's regular work hours;
- (2) Attendance must be voluntary;
- (3) The employee must do no productive work while attending the training; and,
- (4) The program, lecture, or meeting should not be directly related to the employee's job.

g. With respect to the fourth criteria listed in paragraph f(4) above, FLSA regulations state that if a training course is undertaken for the purpose of "preparing for advancement through upgrading the employee to a higher skill, and is not intended to make the employee more efficient in his present job," the training is not directly related to the worker's job, even if the training "incidentally improves his skill in doing his regular work."

h. Roles and Responsibilities of the Employee.

(1) Interested employees should spend time considering their career aspirations and goals, prior to meeting with their supervisors.

(2) Draft their plan with their supervisor.

(3) Employees must recognize that some of this development may be on their own time and potentially at their own expense.

(4) Employees should come to the meeting with an idea of what developmental activities they may want to pursue to reach their desired goals.

i. Roles and Responsibilities of the Supervisor.

(1) Supervisors should review the employees' most recent performance evaluations to be familiar with their areas of responsibility as well as their strengths and weaknesses.

(2) Ensure understanding of their role in the process prior to meeting with the employee.

(3) Supervisors should go over the IDP and procedures and be sure they understand how to complete it.

(4) Supervisors arrange a general meeting with all their subordinates (staff meeting). Copies of the IDP and instructions should be distributed and briefly explained regarding the purpose of the plan.

(5) Supervisors are required to provide the opportunity to participate, to all direct reports, at least annually. Individual meetings should be scheduled to coincide with new performance evaluation cycles to discuss and complete the forms.

(6) Assist their employees in completing their IDP and monitor the employee's progress in meeting their desired goals.

(7) Provide a copy to the employee after the plan has been completed. Keep original in the management file.

(8) Determine whether or not any individual development activities are considered work time.

j. Roles and Responsibilities of the Employee Relations and Performance Management Center of Excellence.

(1) Provide technical assistance and training on preparing the IDP form when needed.

(2) Provide staff with information about resources available for career development when needed.

1-12. Records Retention. Any Corrective Action Plan (CAP) completed in the People First System shall be considered to be included in the employee's official personnel file.

BY THE DIRECTION OF THE SECRETARY:

(Signed original copy on file)

SHELBY JEFFERSON
Interim Human Resources Director

SUMMARY OF REVISED, ADDED, OR DELETED MATERIAL

This revision updates the Department's policy, including, but not limited to, the following:

1. In January 2017, the Florida Department of Management Services (DMS) implemented a new Performance and Talent Management functionality in the People First System. The changes to this operating procedure are to align it with the new functionality in the People First System. Additionally, Career Service, SES, and SMS are consolidated into this one operating procedure.
2. The establishment of all performance expectations, completion of all performance evaluations, and any Corrective Action Plans (CAP) are completed in the People First System. These completed documents in the People First System are a part of the official personnel file.
3. The Individual Development Plan (IDP) has been identified as form CF 736.
4. Additional guidance on development activities and work time is included.

FLORIDA DEPARTMENT OF CHILDREN AND FAMILIES

Individual Development Plan

Our Statement of Individual Development Planning: A departmental commitment that encourages management/leadership development, builds a talent pool within the department, and ensures leadership continuity. This plan is designed to provide a general outline to guide and facilitate staff development.

I. Entity Section

Employee:		Program Area:	
Job Title:		Supervisor:	
PF ID #:		Work Phone #:	

☐ **Employee chooses to NOT participate in the IDP Process.**

Employee's Signature:

II. Description of Development Plan (Assign a number to each position and/or skill(s) listed. Use Section V or additional sheets to give more details)

Performance Review Cycle: From: To:

Short Term Career Goal(s):

Long Term (next 2 – 5 yrs) Career Goal(s) (optional):

Targeted Key Leadership or Other Position (optional):

Skills to be Developed:

	III. Developmental Activities (include a brief description, start date and completion date for each activity listed. Link the Activity to the # assigned to the position and/or skill(s) included in Part II. Use Sections V and VI on page 2 of this form to give more details about each activity.)	Start Date	Completion Date
1.	Title or Description of Training Requested:		
2.	Title or Description of Training Requested:		
3.	Description of Other Developmental Activity:		
4.	Description of Other Developmental Activity:		
5.	Description of Other Developmental Activity:		

FLORIDA DEPARTMENT OF CHILDREN AND FAMILIES Individual Development Plan						
IV. Follow up (Insert scheduled dates for De-briefs with Manager/Supervisor. The <u>minimum</u> required follow up schedule is every six months):						
Scheduled Dates:						
V. Additional Comments						
VI. Resources Required for Listed Activities (Provide Description, and Estimated Costs, if any)						
Resources required for Activity 1:						
Resources required for Activity 2:						
Resources required for Activity 3:						
Resources required for Activity 4:						
Resources required for Activity 5:						
VII. Signatures (Required)						
Employee:					Date:	
Supervisor:					Date:	
Manager:					Date:	
Keep the Individual Development Plan, with original signatures in the Management File.						
Copies: Employee Human Resources						

Individual Development Plan (IDP) Instructions

Each employee will be responsible for developing the substance of his or her own Individual Development Plan. Managers and Supervisors will assist employees by providing information about options for developmental activities that support the goals of the employee's plan.

While not everyone may be interested in becoming a Senior Manager, there may be other positions for which employees are interested in developing Knowledge, Skills and Abilities (KSAs). In addition, the employee may be happy in their current position, but desire to improve or learn new skills.

To determine what areas of development an employee may need for the position he is interested in, you should request a copy of the position description or go online to the Department of Management Services [Classification Plan](#).

Review the class specifications to identify the knowledge, skills and abilities that may be required.

Managers/Supervisors must review and approve the final IDP.

Section	Instructions for Completing the IDP Form
I. Entity	- Enter the employee's identifying information. - This section of the IDP Form must be completed for all DCF employees. - If an employee chooses NOT to participate in the IDP Process, the employee must check the box AND sign in this section.
II. Description of Development Plan	- Enter the From/To dates of the Performance Review Cycle as MM/YY. - At minimum, the description should include the employee's short-term career goals, and skills to be developed. Assign a number to each position to be targeted and/or the skill(s) listed. For example: <i>Short Term Career Goal(s)</i> 1) <i>become proficient in Excel</i> <i>Long Term Career Goal(s)</i> 2) <i>work in Contracts or Budget</i> <i>Targeted Key Leadership or Other Position(s)</i> 3) <i>Supervisor</i> 4) <i>OMCII</i> <i>Skills to be developed</i> 5) <i>Time Management</i> - If an employee is interested in pursuing the skills required of a targeted Key Leadership Position, or any other position within the Department of Children and Families, it should be identified in this section. - Use Section V or attachments if necessary to give more details.
III. Developmental Activities	- Include a brief description of each developmental activity planned. Link the activity to the number assigned to the position and/or skill(s) included in Part II. For example: 1. (become proficient in Excel) Take Advanced Excel Training 2. (Supervisor) Take and Complete Basic Supervisory Training Program 3. (OMCII) Attend budget meetings to learn more about processes. - For training requested, indicate the course name, source of the training, location of the training, and target dates for completion. Also complete Section VI to identify costs. - For all other developmental activities, provide a description, and target dates for completion. Other developmental activities might include self-study, reading, professional memberships, project assignments, details to other program areas, etc. - Also complete Section VI to identify resource requirements, including costs, related to each activity.
IV. Follow-Up	- Insert the scheduled dates that Managers/Supervisors will meet with the employee to discuss their progress toward meeting the goals of the IDP. - The recommendation is to schedule bi-monthly or quarterly sessions, but the minimum required is every six months.
V. Additional Comments	- Use this section as a continuation of Section II, Description of the IDP and/or Section III, Developmental Activities. - This section can also be used to clarify any stipulations or research requirements related to the planned activities.
VI. Resources Required for Listed Activities	- Provide a description of all resources required to complete the activities listed. This includes other personnel/Program Areas involved, approvals required for assignments, facilities, equipment, and supplies required, etc. - This section MUST include an estimated cost related to the activities listed.
VII. Signatures	- Signatures indicate approval for implementation of the activities listed in the IDP. - Signatures are required of the Employee, the employee's immediate Supervisor, and the Reviewing Supervisor.
Distribution	- Upon completion, keep the original Individual Development Plan with original signatures in the Management File. - Submit a copy to: Servicing Human Resources Office Employee - Revisions made to an IDP must also be maintained in the same manner as the original document.