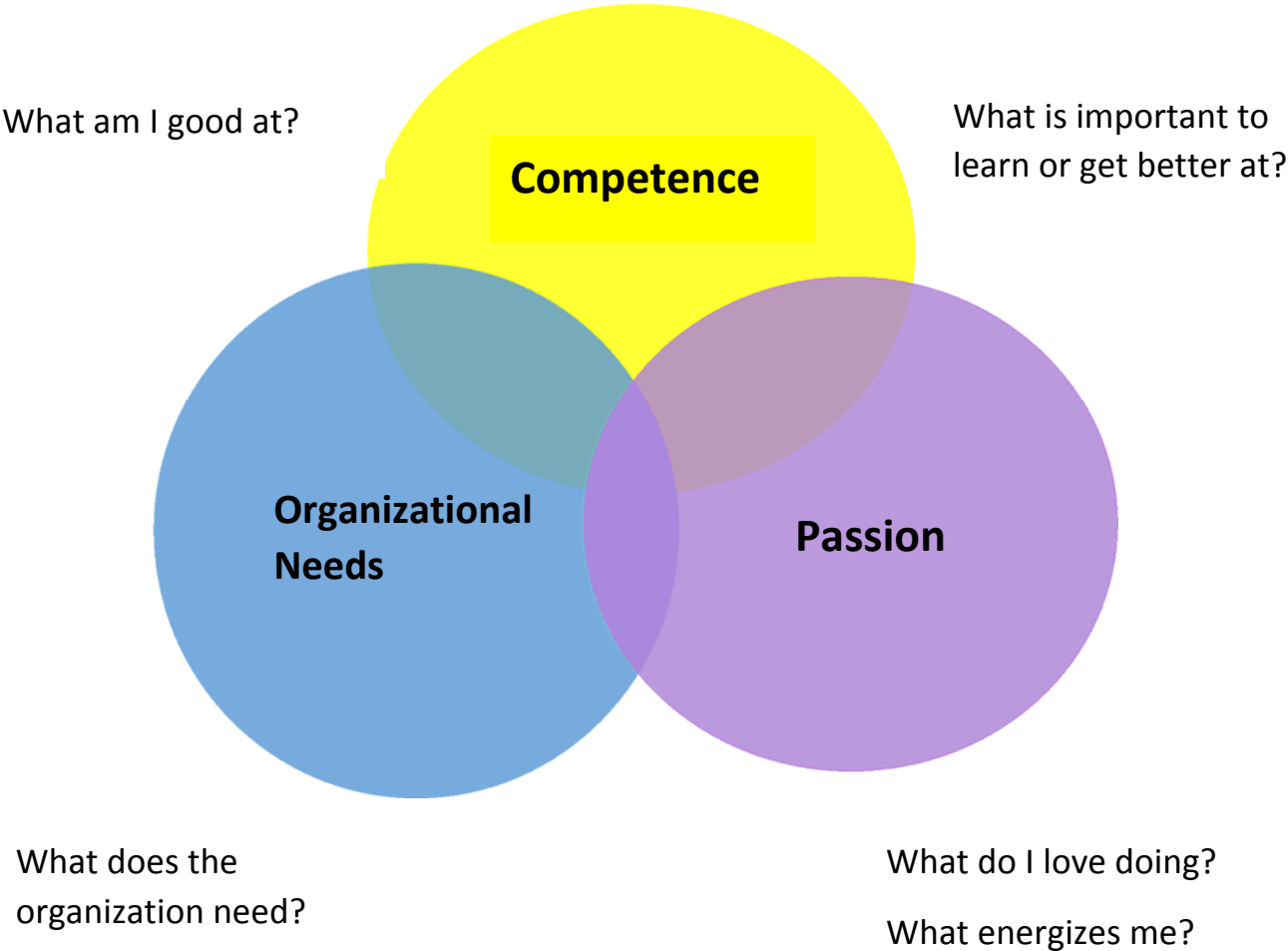


YOU ARE THE GOAL!

Career & Individual Development Planning

Where do I want to be?



① CAREER DEVELOPMENT COMPETENCIES ASSESSMENT

Congratulations on taking a positive step toward your career development. Taking this assessment will help you get started on your journey toward a more fulfilling work life.

ANSWER THE QUESTIONS, AND SCORE USING THE INSTRUCTIONS BELOW.

GUIDANCE ON YOUR NEXT STEPS IS PROVIDED AT THE END.

What allows some people to effectively manage their careers while others do so less successfully? Often, it is the mastery of several key competencies that allow people to be successful in developing their careers. *As you read the following list of career management behaviors, assess your own level of competency in each area of this career development model.*

Not True = 1

Somewhat True = 2

Very True = 3

<i>Self-Assessment Competencies</i>	
I know and value my personal strengths and abilities	
I know how I am perceived by others	
I can realistically assess my career in relation to performance feedback	
I know and appreciate my career values	
I know and value my personality type and work style	
I know and can articulate my career interests as they change	
TOTAL SELF-AWARENESS	

<i>Career Awareness Competencies</i>	
I know what makes work environments personally satisfying and productive to me and am able to create these environments	
I understand the culture of my workplace	
I am able to identify desired organizational values and goals	
I understand industry changes and their impact on my career effectiveness	
I have a sense of future options and opportunities for my career	
I am effective at building relationships and support systems for my career growth	
TOTAL CAREER AWARENESS	

<i>Goal Setting Competencies</i>	
I am able to set goals consistent with performance feedback I have received	
I know how to create a vision of the ideal job and ideal job environment for myself	
I know how to align my individual career development goals with my organization's goals	
I believe I am the one in control of making key career decisions for myself	
I am able to balance priorities and understand why this is important	
I accept that the future is constantly changing and requires regular re-assessment of career goals. I take actions to adjust my goals accordingly.	
TOTAL CAREER AWARENESS	

<i>Skill Development Competencies</i>	
I am able to identify areas of needed skill development through self-assessment and through career development conversations with others	
I have the ability to attract and create development experiences on and off the job	
I understand the positive impact of my skill development on the organization's future	
I am able to use my membership in professional associations to identify trends, skills, and resources for my career growth	
I seek opportunities to learn new skills on a regular basis	
I stay up-to-date and engaged in my career field	
TOTAL SKILL DEVELOPMENT	

<i>Career Management Competencies</i>	
I handle organizational and industry changes effectively and resiliently	
I take actions to balance my personal, social, and professional life	
I know how to effectively manage up through seeking information about my supervisor's goals, problems, and pressures on an ongoing basis	
I persist in career development efforts even in the face of setbacks	
I optimistically view new opportunities as possible and attainable	
I am willing to take personal responsibility for my own career development	
TOTAL CAREER MANAGEMENT	

<i>Scoring Your Career Development Competencies Assessment</i>	
Self-Assessment Competency Score	
Career Awareness Competency Score	
Goal Setting Competency Score	
Skill Development Competency Score	
Career Management Competency Score	

It's **not** necessary to be highly proficient in all of these areas. Rather, focus on leveraging the competencies you are good at, while continuing to work on developing your abilities in the other competencies.

The area in which you have the **LOWEST** score may be the best area for you to begin your career development process. You can then pursue any or all of the other competency areas.

② Career Development Summary

Name _____ Date _____ Supervisor _____

Summary Statements

Career motivators in my current position:
Skills and competencies to be developed:
Vision of future career directions:

Professional Development Goals (Complete left shaded column first)

Contemplate your career goals for the next 1-2 years. List major themes or ideas	What are your one or two top professional development goals for this year? Why are they important to you?
Reflect on feedback you have received from your supervisor and others, and assess and list your skills, talents, and areas to develop.	How are they linked to your career goals?
Consider the needs of the organization: How are roles changing and what new opportunities are on the horizon?	How will achieving your professional development goals support the initiatives of your unit, the Library, and the University?

③ Setting a SMART Goal Worksheet

SMART goals are **S**pecific, **M**easurable, **A**ction-Oriented, **R**ealistic and **T**ime & Resource Bound

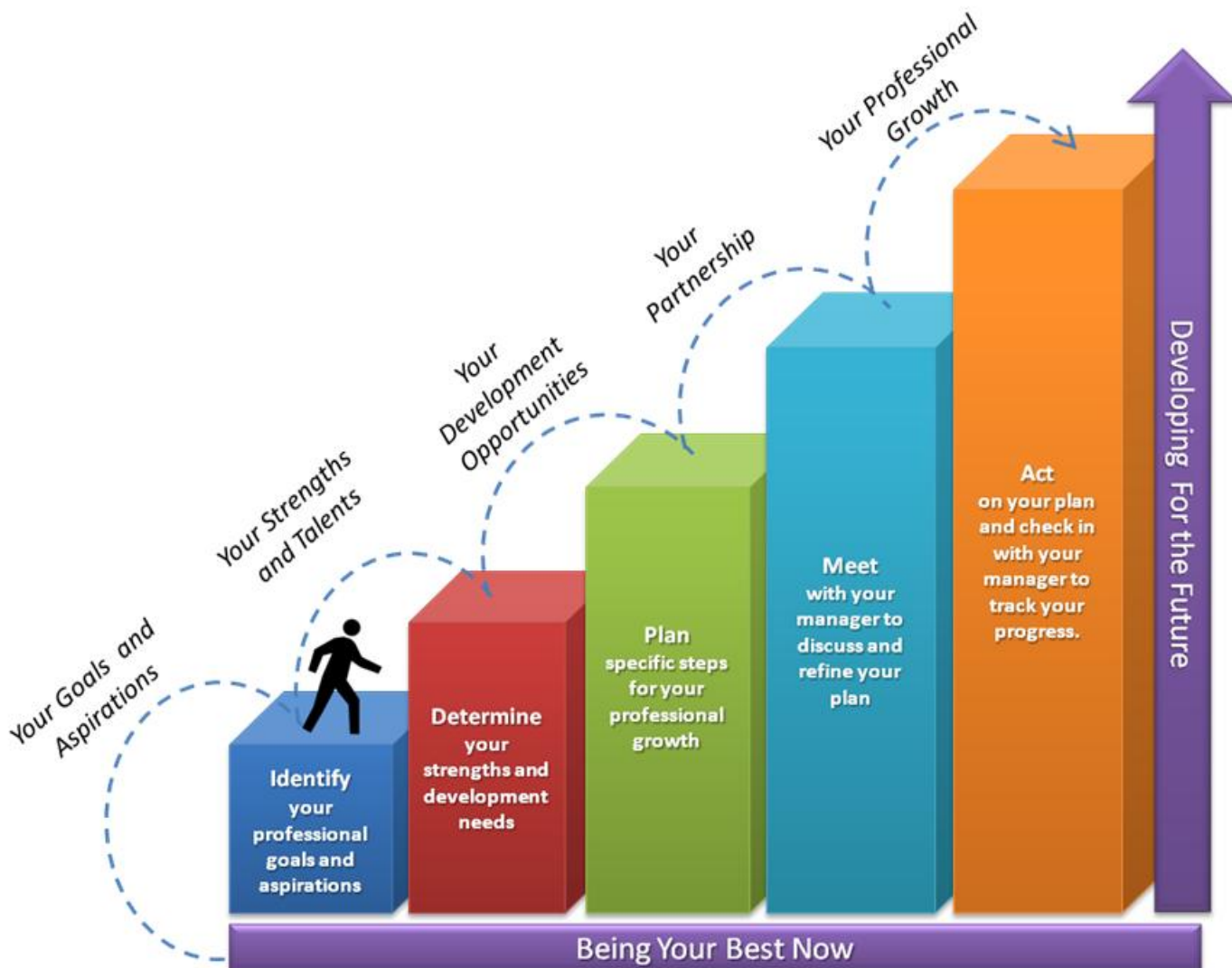
S pecific	Describe a very concise and desired accomplishment. <i>What is it that you want to achieve?</i>
M easurable	Produce quantifiable results in terms of timeliness, cost, quality, and quantity of work. <i>How will you know you have achieved it? How will you know you are successful?</i>
A ction-Oriented	Be observable through behaviors and completed work products. <i>What actions will you take?</i>
R ealistic	Be achievable and balanced with other priorities and timelines. Are in alignment with one's values and authentic desires. Challenging rather than easy to attain. <i>Why is it important to you? How does it serve you?</i>
T ime & Resource Bound	Have a target completion date and to achievable given the resources available. <i>When will you start? When do you expect to achieve your goal?</i>

INDIVIDUAL DEVELOPMENT PLAN –

IDP is a process you direct, in partnership with your manager, to enhance your professional growth by:

- *Identifying and pursuing your personal goals for professional development*
- *Setting goals to learn or improve in important competencies you will need now or in the future*
- *Identifying your strengths, talents and passions and planning ways to use them on the job*

As a part of your IDP, you will identify the professional goals that matter to you, determine what experiences, skills and behaviors will help you achieve those goals and then create a plan of action to achieve your goals. You will work with your manager to evaluate areas that have the greatest potential to pay off for you, and for the organization, in the short term and longer term. In this way, you and the university can succeed together.



⑤ Individual Development Plan (IDP) Form

Name _____ Title _____ Date _____

Department _____ Supervisor's Name _____

Short Range – Critical within present position (1 year)

Overall Goal:

Objective (Skills to be acquired)	Learning Activities	Target Dates	Cost Estimate	Learning Success Criteria	Reflection / Status

For this goal, check the key related UC Core Competencies that should be demonstrated (if applicable):

- | | | |
|---|--|---|
| <input type="checkbox"/> Communication | <input type="checkbox"/> Job Mastery & Continuous Learning | <input type="checkbox"/> Teamwork & Collaboration |
| <input type="checkbox"/> Diversity & Inclusion | <input type="checkbox"/> Resource Management | <input type="checkbox"/> People Management |
| <input type="checkbox"/> Employee Engagement | <input type="checkbox"/> Results Orientation & Execution | |
| <input type="checkbox"/> Innovation & Change Management | <input type="checkbox"/> Service Focus | |

Mid-Range – Important for growth within present position (2 years)

Overall Goal:

Objective (Skills to be acquired)	Learning Activities	Target Dates	Cost Estimate	Learning Success Criteria	Reflection / Status

For this goal, check the key related UC Core Competencies that should be demonstrated (if applicable):

- | | | |
|---|--|---|
| <input type="checkbox"/> Communication | <input type="checkbox"/> Job Mastery & Continuous Learning | <input type="checkbox"/> Teamwork & Collaboration |
| <input type="checkbox"/> Diversity & Inclusion | <input type="checkbox"/> Resource Management | <input type="checkbox"/> People Management |
| <input type="checkbox"/> Employee Engagement | <input type="checkbox"/> Results Orientation & Execution | |
| <input type="checkbox"/> Innovation & Change Management | <input type="checkbox"/> Service Focus | |

Long-Term – Growth for potential promotion or career change (5 years)

Overall Goal:

Objective (Skills to be acquired)	Learning Activities	Target Dates	Cost Estimate	Learning Success Criteria	Reflection / Status

For this goal, check the key related UC Core Competencies that should be demonstrated (if applicable):

- | | | |
|---|--|---|
| <input type="checkbox"/> Communication | <input type="checkbox"/> Job Mastery & Continuous Learning | <input type="checkbox"/> Teamwork & Collaboration |
| <input type="checkbox"/> Diversity & Inclusion | <input type="checkbox"/> Resource Management | <input type="checkbox"/> People Management |
| <input type="checkbox"/> Employee Engagement | <input type="checkbox"/> Results Orientation & Execution | |
| <input type="checkbox"/> Innovation & Change Management | <input type="checkbox"/> Service Focus | |

Development Opportunities

There are several methods to facilitate learning. These are just a few examples:

Assignments

- Job rotation
- Stretch
- Temporary

Cross Training

- Changing functions
- Shift changes
- Working with new people

On-the-Job Opportunities

- Taking on new projects or assignments
- Temporary assignments, e.g. filling in for someone on vacation
- Assuming lead role responsibilities
- Improving a process or procedure

Committees

- Work groups
- Presentations

Start-Ups

- New team
- New system / service / process

Off-the-Job Opportunities

- Joining/leading community groups
- Trying a new skill in a volunteer organization
- Giving presentations to civic groups

Develop in Place

- Mentoring
- Individual projects
- Perspective building
- Tough challenge
- Shift in size of job

Self-Development

- Readings/Self-study
- Professional organizations
- College/University Programs
- Seminars
- On-Demand Webinars/Videos/Courses

Formal Training / Development

- Professional
- Technical
- Leadership
- Executive

1. Present at or lead a meeting(s) you do not normally run.
2. Take on a significant role for a task/project/activity that crosses departmental boundaries.
3. Put yourself in someone else’s shoes (shadow, or job swap for a predetermined time).
4. Mentor someone in the organization.
5. Volunteer, and take a lead role.
6. Join a professional organization, and sign up for a committee of interest, or a role on the board.
7. Network to meet at least 6 new people at UCSB.
8. Do an information interview(s) with someone(s) whose role interests you, and discuss what you learned with your manager.
9. Serve as coordinator of a search/interviewing team for a position your group is looking to hire into, and fulfill the role of key liaison with HR for this position opening.
10. Build a business case for a change in your department, and present it to your manager.
11. Sign up to take part in a UCSB community event or activity (United Way, Blood Drive, Associated Students Food Bank, etc.)
12. Do research on a topic that interests you and is related to your department, or UCSB, and present your findings at a staff meeting, or to your manager.
13. Create a process map for a service you provide to your customer groups, and analyze it for potential improvements.
14. Form and lead a team to improve hand-offs between your department and one of your customer groups or departments.
15. Teach someone a skill or area of expertise you possess.
16. Become a member of a UCSB community group (e.g. UCSB Sustainability) and take on a leadership role in the group.

⑥ My Individual Development Plan (IDP)

What is an IDP?

- A written plan that outlines what career goals you want to accomplish and what steps you can take to meet those goals.
- A tool you can use to identify, organize, and plan your career.
- A tool for creating a personalized plan that best reflects your career aspirations, whether you want to plan for professional development, promotional opportunities, re-careering within the University, or retiring in the next few years.

Why have an IDP?

- To focus your professional efforts and identify individual work goals.
- To use as a communication, development, and/or planning tool.
- To assist in obtaining resources (e.g., scholarships, fee assistance or training funds).
- To serve as your career action plan for skill building, professional development and career management.

INSTRUCTIONS

Getting Started

If you are not sure what your career goals are, then you might try the following:

Ask yourself ... what areas of my work do I want to develop?

What areas of my work do I need to improve?

What direction is my department going and what do I need to grow with it?

What can I do to find out about other career opportunities?

Consider these ideas to get you started:

- ✓ Talk with your supervisor
- ✓ Meet with a mentor
- ✓ Schedule a confidential session with the Learning Organization Librarian
- ✓ Read career development books

Filling out the IDP Form

My Goals – What are the overall goals I want to accomplish in each time period?

- Write down the overall goals you want to accomplish in the short term (this next year), mid-term (next 1-2 years), and long-term (3-5 years)
- You can have more than one goal (use additional sheets)

My Objectives – What skills and knowledge do I need to learn to move toward accomplishing my goal?

- Break down the specific skills or knowledge you want to develop; write them down, one (or like-kind grouped) in each row.
- Sometimes it's helpful to think on a timeline and identify the specific action steps you need to take.

Learning Activities – How am I going to acquire the skills and knowledge?

Write down the specific action steps you need to take to gain the skills or acquire the knowledge you have identified, for example:

- Sign up for a course through lynda.com, ALA, Library Juice Academy, or others listed monthly in the Learning & Growth Opportunities newsletter
- Peruse the Learning & Growth On-Demand database for webinar recordings to watch and inform the Learning Organization Librarian so these can be added to your learning transcript
- Identify a professional conference that focuses on and offers programs that will support your goal
- Remember to obtain release time and/or training & development funding
- Go on informational interviews to find out what skills are needed to be prepared for that job
- Job shadow someone in the library who holds a job of interest to you
- Talk with your supervisor

Target Dates – What is my time schedule?

Write down the date you plan to start working on this goal and the date your plan to finish.

Cost Estimate – What might the costs be and who will pay them?

Does a conference, course or webinar require a registration fee? Is travel involved?

Learning Success Criteria – What will success look like after acquiring the skill or knowledge?

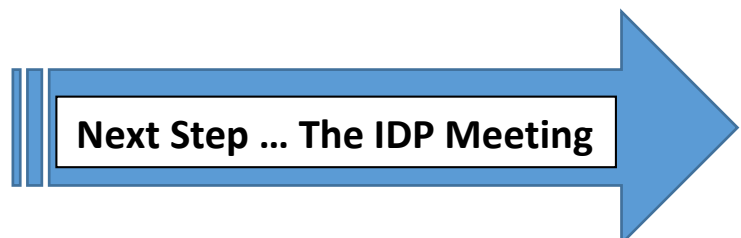
- How will I know or feel that this learning activity has been successful for me?
- What will I be able to do differently or more effectively with this new skill or knowledge?
- What types of tasks can I now take on to continue using this skill or knowledge to ensure retention and reach mastery?

Reflection / Status – To be filled out when the objective has been met and learning activity completed.

- Track any thoughts you may have during the learning process.
- Make note of the date each learning activity was completed.
- Reflecting on a learning experience helps cement the skill or knowledge in your mind.
- Thinking back over the learning activity and skill attainment, was it a positive experience? Did you have insights about yourself and/or your career goals that you had not been aware of before?

UC Core Competencies Demonstrated

Which of the 9-10 core competencies were demonstrated by you in reaching this overall goal. There can be multiple selections that apply!



⑧ The IDP Meeting – Meet with Your Supervisor

Individual Development Planning is a partnership – a joint effort – *led* by the employee and *supported* by the supervisor. The plan begins to come alive during the IDP meeting. In this meeting the employee and manager discuss and refine the ideas they have prepared before the meeting. The focus of the meeting will be about development within the current job as well as the possibilities of future career development.

The output from the discussion is a refined IDP with goals and activities spelled out and agreed upon that will allow the employee to grow in directions of interest while contributing to the needs of the organization. Together the employee and supervisor create a plan the employee can act on and the supervisor can support.

Getting Ready

Employee Role

Prepare for the meeting

- ~ Review your most recent performance appraisal and goals for this year. Think about what skills are needed for your current work and future positions, along with your interests and UCSB's needs.
- ~ Complete the IDP Form provided at the workshop.
- ~ Prepare to lead the discussion – this is *your* development plan
- ~ Use the meeting steps in the next section to plan and stay on track during the meeting

Meet

- ~ Your role is to provide an overview of your thoughts for each section of your IDP and share how you arrived at your ideas.
- ~ Invite your supervisor to share his/her perspective as you move through each section and come to agreement about what will be incorporated in the final plan.
- ~ Set a time to get the refined IDP back to your supervisor and calendar a time for a progress check-in.

Manager Role

Prepare for the meeting

- ~ Review the employee's most recent performance appraisal and goals
- ~ Think about resources and opportunities that might provide development for the employee
- ~ Think about how your employee's talents and strengths can be best utilized
- ~ Your employee will use the meeting steps in the next section to walk you through his/her ideas and goals for professional development

Meet

- ~ Your role is to help the employee think through the plan based on what you know about the department's direction and goals, the University's goals, and the employee's skills.
- ~ Make sure you're clear about what will be included in the refined IDP and how you will support it.
- ~ Calendar the first progress check-in with the employee.

The Meeting

1. State the purpose and process for the IDP discussion. "I would like to talk about ideas for my development and get your feedback so that we can agree on some next steps."
 2. Give your supervisor an overview of each section of the IDP form and share how you arrived at your conclusions for each.
 3. Ask and listen. Invite your supervisor to share his/her perspective on each of the sections as you move through them, and *listen carefully* to understand his/her perspective and reactions.
 4. Decide with your supervisor which ideas to incorporate into your revised plan. Agree when you will send him/her the finalized IDP form.
 5. Thank your supervisor for his/her support and set a time during the next quarter when you will meet to check-in on progress.
-

Act on Your Plan

Employee Role

Follow-up on the plan

- ~ Send your supervisor a copy of the finalized plan.
- ~ *Act on the plan.* Implement the plan – this is your career, your future, and only you can take the steps required to develop and grow your skills and capabilities.
- ~ Hold to your scheduled meetings with your supervisor to track progress and make adjustments as necessary.

Manager Role

Follow-up on the plan

- ~ Help your employee secure resources or opportunities to accomplish their goals (training, new assignments, people to contact, etc.).
- ~ Check-in informally on a regular basis to find out how much progress has been made.
- ~ Hold to your scheduled meetings with your employee to track progress and coach as necessary.

Congratulations on completing your IDP process for this year!!!

We gratefully acknowledge the following resources in the development of this course:

UC Berkeley (2010). Career Development Action Plan. Accessed from <http://hrweb.berkeley.edu/learning/career-development/career-management/planning/action-plan>

UC Davis (2010). Career Development is for Everyone! Accessed from <http://sdps.ucdavis.edu/>

UC Irvine (2013). Professional Development Plan – PDP. Accessed from <http://apps.adcom.uci.edu/cms/public/HumanResources/HRGeneral/HRMainWebPage.html>

UC Riverside (2012). Individual Development Plan. Accessed from <http://hr.ucr.edu/education/yourguidetoprofdev.html>

UC San Diego (2013). Your Individual Development Plan. Accessed from <http://blink.ucsd.edu/HR/training/IDP.html>

UC San Francisco (2014). My Individual Development Plan (myIDP). Accessed from <https://career.ucsf.edu/phds/myIDP>

Yale University (2012). Individual Development Planning: Achieving Higher Performance Guide to Getting Started. Accessed from <http://www.yale.edu/hronline/idp/>

Professional Development Resources

✓ [Wyoming State Libraries](#)

Free webinars and workshops for all types of libraries.

✓ [“Learning Beyond” Calendar](#)

Free and low-cost webinars, e-courses and online workshops of interest to academic libraries.

✓ [Florida Library Webinars](#)

Free on-demand webinar recordings on various professional development topics for all types of libraries.

✓ [ALA Divisions](#) / [ALA Store](#)

Multiple divisions offer low-cost webinars, and the ALA Store offers webinars and eCourses for reasonable cost.

✓ [Library Juice Academy](#) – low-cost e-courses

✓ [Infopeople](#) – Free webinars and low-cost e-courses

✓ [Webjunction](#) – Free webinars

[Coursera](#) – free and low-cost e-courses

[Codecademy](#) – free coding e-courses

[Udacity](#) – free and low-cost e-courses

[MIT Open CourseWare](#) – open education e-courses

[EdX](#) – free and low-cost e-courses

[Stanford](#) / [Harvard](#) / [Yale](#) / [UC Berkeley](#)

✓ **Library Grant Opportunities**

- Research Awards/Grants

<https://wiki.library.ucsb.edu/x/-W3G>

- ALA Award and Grand Opportunities

<https://wiki.library.ucsb.edu/x/I2LG>