



IDP Self-Assessment Worksheets

These worksheets will help you formulate some initial thoughts which you can use to have your IDP conversation with your manager. Use them to generate ideas which can feed into agreed on specific goals and actions for your IDP plan for the year.

Part 1 Professional Goals and Aspirations –

As a first step, it can be helpful to identify where you are in relation to where you may want to move on your professional path.

- Are you new in your role, or new to your organization, and needing to master essential competencies critical for your success?
- Are you thinking about preparing for a different role, which may require different skills, or developing existing skills into significant strengths?
- Are you experienced in your role, and looking to maintain full engagement and enthusiasm through taking on additional challenge, or building competencies that are needed to meet changing work demands, or using strengths more fully, or mentoring others?

Use the following questions to further refine your professional goals.

1. What gives me the greatest sense of satisfaction and reward?
2. What do I want to do that I am not currently doing?
3. What do I care most about in my work and life?
4. How will these goals and motives help me deliver results at Yale?
5. What is now, or will be of greatest need to Yale, or to my department, in the future? What are the necessary competencies I'll need to contribute?
6. Do I see myself changing roles? If so, when, and what does that next role look like?

7. How might my role change in the future? What competencies will I need to be ready?
8. What work experiences do I need to have to develop professionally, to stay engaged?
9. Where do my professional goals and aspirations overlap and align most with the needs of the organization?

Part 2 Strengths – Development Opportunities –

Now think about your current strengths and development opportunities. You will not necessarily have a strength and development opportunity in every category below, but you may. The idea is to go with “top-of-mind” responses at this stage of planning. As you continue to plan each year, you will find your areas of strengths and development opportunities will change, so there is no need to identify or accomplish everything at once.

TECHNICAL KNOWLEDGE or EXPERTISE SKILL AREAS - Examples: Finance, process improvement, project management, computer applications, strategic planning, consulting, etc.

Strength –

Development opportunity –

PERSONAL SKILL AREAS – Examples: Managing time, taking initiative, planning and organizing work, problem solving, providing customer service, etc.

Strength –

Development opportunity –

INTERPERSONAL SKILL AREAS – Examples: Collaborating, working on teams, influencing, listening, resolving conflict, etc.

Strength –

Development opportunity –

MANAGEMENT AND LEADERSHIP SKILL AREAS – Motivating others, delegating, coaching, giving feedback, setting clear goals and expectations, strategic planning, communicating well, getting participation from others, etc.

Strength –

Development opportunity –

Part 3 *Passions* –

In our rational, pragmatic minds, we don't often spend time thinking about what we simply love working at – our passions. However, if we would analyze when it seems that "time just flies," or when we experience a healthy dose of satisfaction, we would probably discover that we are applying skills or abilities that we love using. These are automatic motivators for us, and we can leverage them to achieve great results, to build skills into strengths, and to keep us fresh and focused at work.

Check the areas below that fit the description of passions so you can factor them in when you are ready to create your IDP.

PASSIONS

CONTRIBUTING EXPERTISE AND RESULTS

- Providing information and expertise to others in the organization
- Producing work based on my own technical expertise
- Working with others on a team as an individual contributor
- Solving technical problems
- Teaching others the skills and knowledge in my area(s) of expertise
- Working directly with customers to resolve issues
- Other

SUPPORTING PEOPLE

- Communicating goals and expectations
- Recognizing people for high performance
- Overseeing team and individual efforts and providing timely feedback
- Delegating tasks to provide growth opportunities for others
- Discussing career development with direct reports
- Intervening and facilitating with teams and individuals to work through issues and problems
- Other

DESIGNING and ASSISTING with HOW WORK GETS DONE

- Establishing procedures for problem solving and decision making
- Designing and implementing systems and practices to support organizational objectives
- Cultivating relationships and networks to procure key resources and improve work flow
- Overseeing processes and metrics to ensure quality and identify targets for improvement
- Developing project plans and delivering project status updates
- Leading or facilitating teams to accomplish work
- Other

DEVELOPING the FUTURE VISION, CULTURE and ARCHITECTURE OF THE ORGANIZATION

- ___ Translating organizational goals and strategies into goals for my department
- ___ Communicating change and strategy to my staff
- ___ Holding strategic discussions to establish work priorities
- ___ Developing a vision for the future for my part of the organization
- ___ Scanning the environment for trends and assessing organizational challenges and opportunities
- ___ Anticipating the cultural and other impact of different decisions or directions on the organization
- ___ Other

Part **4** *Alignment* –

ALIGNMENT – YOUR PROFESSIONAL GOALS AND THE ORGANIZATION'S GOALS

Now you've developed a clearer sense of yourself in terms of what you have to offer professionally, and what you want to have to offer, now and in the future. It's time to think about how this feeds into your current role and the directions you may have in mind going forward. It's also important to consider where your department is going and where the university is going, so that you can connect with opportunities to grow and develop, both in your role now, and with an eye to the future. Answer the items below to focus your thinking.

What will be important for me to perform at the maximum level in my current job?

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

What future roles or positions are exciting to me?

What skills and capabilities will be important to prepare for future roles?

YOU'RE READY TO PLAN!!

Use the information you've compiled here to zero in on two to three areas of importance for this year's individual development plan, and make some notes on the IDP Conversation Tool to prepare for your meeting. Visit www.yale.edu/idp to download an IDP form, and find more tools, and resources to help you with the IDP process.