



# **Individual Development Planning (IDP)**

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## **Module: Coaches and Mentors**



## Individual Development Planning in SATERN

In addition to current capabilities available in SATERN to manage NASA training activities, employees can now 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

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

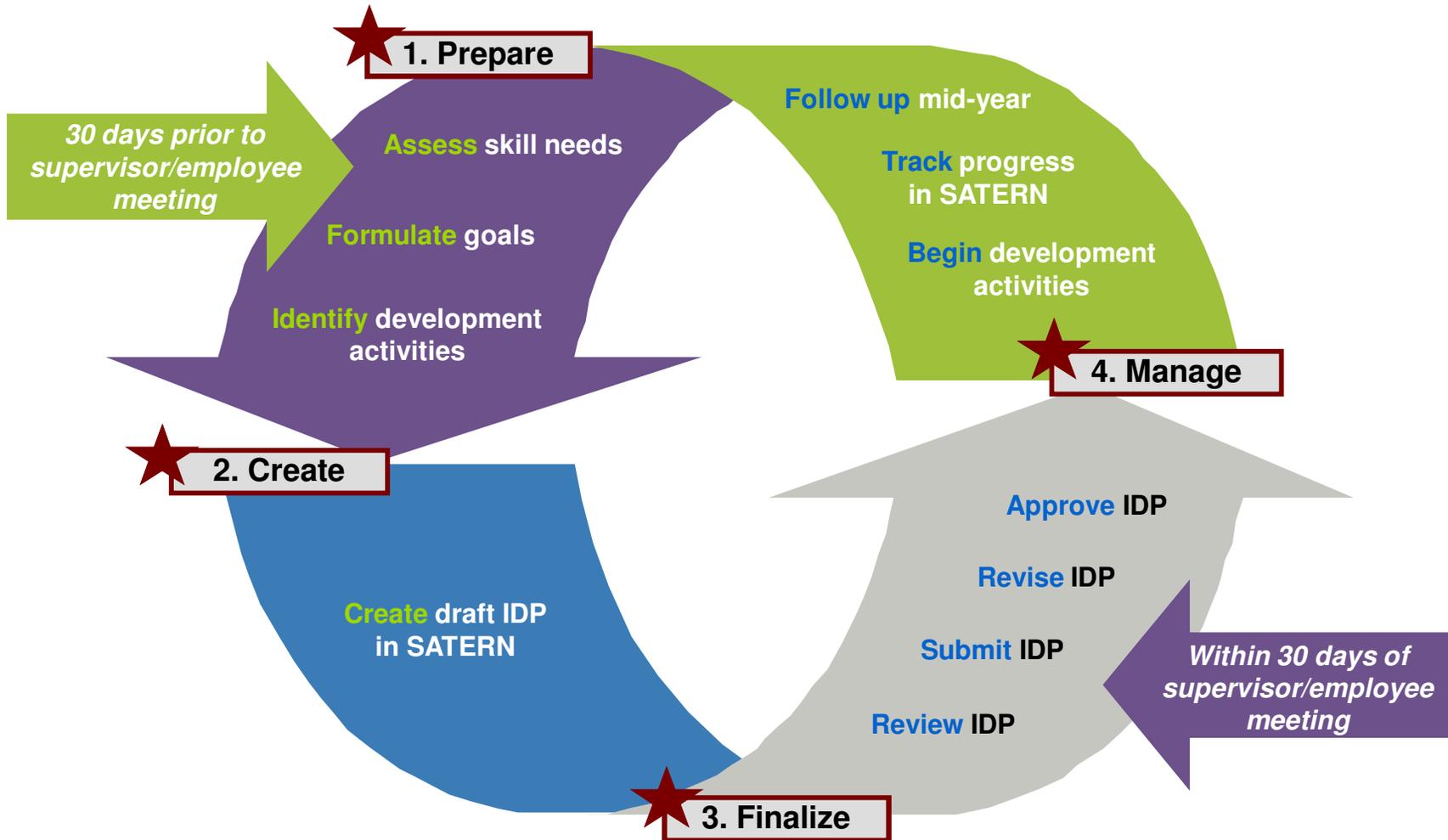
The type of assistance that an employee requires during the IDP process is determined through formal or informal discussions with the mentor. The mentor and the mentee should agree in advance about what support is being requested and the timeframe for the support.

The Individual Development Planning process is comprised of four phases: **Prepare**, **Create**, **Finalize** and **Manage**.

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

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



## 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.

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 (culture, politics, structure)
- Help the employee think strategically and link him/her with others who can enhance his/her learning



## 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. 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. Therefore, the mentee should notify the mentor when they are ready for their review.

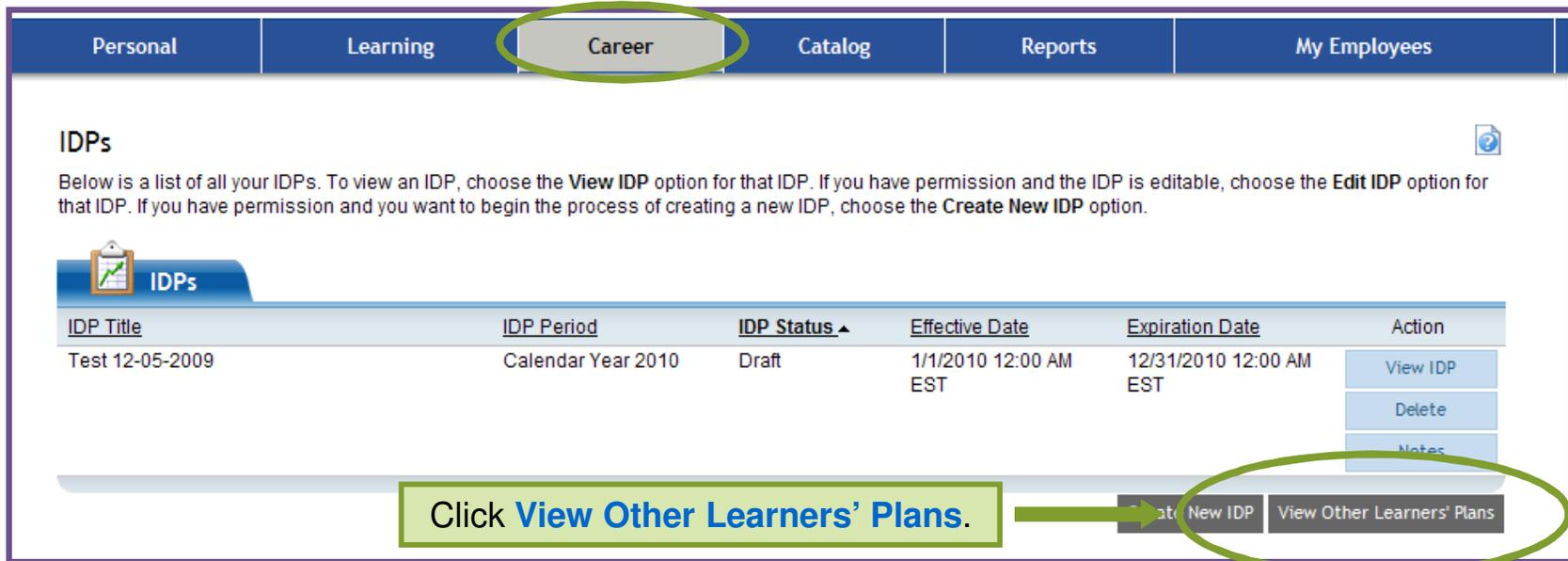
The following slides will walk you through the process of reviewing the IDP in SATERN, specifically how to:

- 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 click on the **Career** tab, then select **IDP**.

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



The screenshot shows the SATERN interface with the 'Career' tab selected. Below the navigation bar, there is a section for 'IDPs' with a list of IDPs and a 'View Other Learners' Plans' button. The 'Career' tab is circled in green. A green box highlights the text 'Click View Other Learners' Plans.' with an arrow pointing to the 'View Other Learners' Plans' button, which is also circled in green.

Personal Learning **Career** Catalog Reports My Employees

**IDPs**

Below is a list of all your IDPs. To view an IDP, choose the **View IDP** option for that IDP. If you have permission and the IDP is editable, choose the **Edit IDP** option for that IDP. If you have permission and you want to begin the process of creating a new IDP, choose the **Create New IDP** option.

IDP Title	IDP Period	IDP Status ▲	Effective Date	Expiration Date	Action
Test 12-05-2009	Calendar Year 2010	Draft	1/1/2010 12:00 AM EST	12/31/2010 12:00 AM EST	<a href="#">View IDP</a> <a href="#">Delete</a> <a href="#">Notes</a>

Click **View Other Learners' Plans**.

[Create New IDP](#) [View Other Learners' Plans](#)

## Select an IDP for Review (cont.)

The **Other Users' IDPs** page will list the development plans to which you have been granted access. In the far right column, a list of possible **Actions** will display.

Click **View IDP**. This will allow you to view the IDP and add comments.

**Other Users' IDPs**

Below is a list of the users' IDPs for whom you are a Coach. To view an IDP, choose the **View IDP** action for that IDP. As a Coach, you may view or add notes to an IDP at any time.

<u>Learner Name</u>	<u>IDP Title</u>	<u>IDP</u>	<u>IDP</u>	<u>Effective Date</u>	<u>Expiration Date</u>	<u>Action</u>
SHUKLIN, SOPHIA	System Engineering	PY	Rejected	5/1/2009 2009 -	4/30/2010 12:00 12:00 AM EST	<a href="#">View IDP</a> <a href="#">Notes</a>

Click **View IDP**.

Click **Notes**.

Clicking **Notes** brings you into the employee's plan in the **IDP Notes** mode.

## View Plan Details

To see the development activities listed under each goal, click the ► symbol to expand that section.

Development

Title:  Add Description

Group By: Section ▼ Field Chooser New Goal

▼ Section Name: MID-RANGE GOALS: 2 - 4 YEARS(1)

Goal Name ▲	Target Date	Priority	Percent Toward Target	Action	Remove
► Develop people management skills	9/30/2012	Improve skill set/may not be current job		<a href="#">View/Add Notes</a> <a href="#">Move Goal</a> <a href="#">Edit</a>	<a href="#">✕</a>

Click the ► symbol.

## Make Comments

Once you have viewed the IDP, you can add comments to any goal, activity, and/or the plan as a whole.

To add notes, click the **View/Add Notes** button next to the section on which you'd like to comment.

The screenshot displays the IDP system interface. At the top, it shows 'Section Name: MID-RANGE GOALS: 2 - 4 YEARS(1)'. Below this is a table of goals with columns for Goal Name, Target Date, Priority, Percent Toward Target, Action, and Remove. The first goal is 'Develop people management skills' with a target date of 9/30/2012 and priority 'Improve skill set/may not be current job'. The 'View/Add Notes' button for this goal is circled in green. Below the goal table is a 'Details' section for 'Activities (1)'. It contains a table with columns for Name, Due Date, Type, Priority, Target/Stretch, Action, and Remove. The activity is 'Leadership development assignment' with a due date of 9/30/2012 and type 'External Activities (Activities Not in the Catalog such as Academic Courses, Conferences, and Seminars)'. The 'View/Add Notes' button for this activity is also circled in green. Two green arrows point from a callout box at the bottom to these two buttons.

Goal Name	Target Date	Priority	Percent Toward Target	Action	Remove
▼ Develop people management skills	9/30/2012	Improve skill set/may not be current job		View/Add Notes Move Goal Edit	✕

Name	Due Date	Type	Priority	Target/Stretch	Action	Remove
Leadership development assignment	9/30/2012	External Activities (Activities Not in the Catalog such as Academic Courses, Conferences, and Seminars)	For mission objectives/job requirements	5 / 7	View/Add Notes Edit	✕

Click **View/Add Notes**.

## Make Comments (cont.)

The **Notes** page allows you to view any comments that have already been added to the selected section.

Notes can be made by the employee, supervisor, or by a coach or mentor. To add your notes, type the text in the box provided and click **Add**. If you choose not to add notes, you can exit by clicking **Back** at the top of the screen.

The screenshot shows two sections of a web interface. The top section, titled 'Add Notes', contains a text input field labeled '\*Notes:', a checkbox labeled 'This is a private note.', and an 'Add' button. A green box labeled 'Enter comments.' has an arrow pointing to the text input field. Another green box labeled 'Click Add.' has an arrow pointing to the 'Add' button, which is circled in green. The bottom section, titled 'Review Notes', displays a comment: 'Supervisor, BLISS, STEVEN D - 12/8/2009 04:08 PM EST I WAS logging on to approve this when I got your email... so now I'm rejecting.' A green box labeled 'View comments.' has an arrow pointing to this comment.

Checking **This is a private note.** 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.”



## 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>