



SATERN

System for Administration, Training, and Educational Resources for NASA

Individual Development Planning Guide

(Version 1.0)
April 2010



Table of Contents

1	Introduction	3
1.1	What is an Individual Development Plan (IDP)?	4
1.2	Why has NASA integrated the IDP and SATERN?	5
1.3	Who is involved in the process	5
1.4	IDP Process Phases	7
2	General Instruction	8
2.1	For the Supervisor	8
2.2	For the Employee	9
2.3	Are You Ready to Begin	10
3	PHASE 1: Prepare for Your IDP	11
3.1	Assess Skill Needs	12
3.2	Formulating Goals	12
3.3	Identifying Development Activities	13
4	PHASE 2: Create Your IDP	15
4.1	Add a Coach or Mentor	16
4.2	Verify your Supervisor	17
4.3	Navigate to IDP	17
4.4	Create a New Plan	18
4.5	Enter Plan Information	18
4.6	Adding Goals and Activities	21
4.6.1	Add a Competency-Based Goal	22
4.6.2	Add a Competency-Based Catalog Item	26
4.6.3	Add a Non-Competency Based Goal	30
4.6.4	Add an External Activity	34
5	PHASE 3: Finalize Your IDP	38
5.1	View Your IDP	39
5.2	Print Your IDP	40
5.3	Check Notes From Your Coach or Mentor (Optional)	41
5.4	Verification With Your Supervisor	44
5.5	Make Edits to Your IDP	45
5.6	Submit Your IDP	46
5.7	If Your IDP is Rejected	49
5.8	Summary	50
6	PHASE 4: Managing Your IDP	51
6.1	Start Work on Activities	51
6.2	Track Your Progress in the IDP	53
6.3	Follow Up with Your Supervisor	55
6.4	Revise Your IDP	56
6.5	Prepare for Next Year	56
6.6	Copy Your Current Goals into a New IDP	57
7	Summary	58
8	Frequent Asked Questions (FAQs)	59

1 Introduction

This guide explains the responsibilities of the employee and supervisor in completing the Individual Development Plan (IDP), and outlines a step-by-step process for preparing and creating an IDP. The IDP is developed by the employee and their supervisor. As the Plan is built, the employee and supervisor will outline developmental objectives and career goals.

The IDP employs a concept that emphasizes discussion and joint decisions by the employee and the supervisor, with input from coaches and/or mentors, on the specific developmental experiences necessary to fulfill the mutual goals of individual career development and organizational enhancement. Each IDP is uniquely tailored to the needs of the individual and the organization.

Training and development identified on IDPs does not replace standard training request procedures. Developmental assignments begin with discussion with your supervisor and require your supervisor's approval. IDPs are updated annually, or as needed when significant changes occur, such as, a change in job or change in the way you do business processes. IDPs are dynamic and like any other "plan", can, and probably will change. IDPs serve as a basis for interaction between you and your supervisor in career planning.

The Office of Human Capital Management strongly recommends the use of IDPs and firmly believes in the importance of workforce development and the enhancement of employee skills and competencies. Individual development planning contributes to our goal of ensuring a more knowledgeable and highly skilled workforce.

This guide will help you to:

- Analyze your career goals and objectives.
- Learn how to create IDPs.
- Prepare your formal IDP.
- Analyze the organization's needs for individual development planning.
- Prepare for the employee-supervisor discussion.
- Find and use resources for individual development planning.
- Prepare, Create, Finalize, and Manage your SATERN IDP.

To print or download a copy of this guide go to https://saterninfo.nasa.gov/IDP_Guides&Aids.html and click on **Individual Development Planning Guide** in the Tools section of the page.

Definition

The Individual Development Plan (IDP) is a career development tool designed to help employees identify their development needs in relation to their current and future job responsibilities, and to document activities they plan to accomplish during the designated time frame. The plan contains training, education, and development activities (formal and informal) to acquire the competencies needed to meet individual planning goals. The IDP focuses on enhancing the competencies the employee needs in order to improve the Agency's effectiveness.

Other factors considered are how training and development:

- Help the individual achieve mastery of desired competencies.
- Help the employee remain current with developments in his or her respective discipline.
- Contribute to preparing the individual for increased responsibilities.
- Promote personal and professional growth.
- Provide structured learning experiences linked to organizational needs, goals, and job requirements.

Purpose

The purpose of the IDP is to provide employees with an opportunity to:

- Assess their skills and knowledge through self-evaluation and discussion with their supervisor.
- Document their plans for activities which can prepare them for accomplishing their career development goals.

In addition, IDPs:

- Establish an agreed-upon set of learning objectives/goals and developmental activities as part of a formal career development program.
- Serve as another source for providing information helpful to organizations for monitoring their training and development needs.

Disclaimer: An IDP is not a binding contract. While every effort should be made by both employees and supervisors to adhere to the plan, circumstances sometimes arise that require modifying the IDP. Completing an IDP does not imply promotion; it is intended to address developmental needs and facilitate growth while preparing the organization for future challenges.

1.1 What is an Individual Development Plan (IDP)?

An IDP is a collection of goals, objectives, and activities for a specific employee developed collaboratively between you and your supervisor. The IDP reflects the developmental needs for your current position as well as your future developmental needs. It identifies training and other developmental experiences needed to achieve both personal and Agency goals within a specific timeframe.

An IDP is...

- An official planning document used to capture training and development activities as a NASA employee
- A tool to help you and your supervisor communicate about developmental needs
- An opportunity to learn where your skills fit into NASA's current and future workforce needs
- Available to all NASA civil service employees

An IDP is NOT...

- Set in stone; it is a working document which should change as needs and priorities change
- A contract between you and NASA for training or a guarantee of advancement
- A performance management tool. Completion of activities on the IDP is not a factor in the performance management process
- Available to NASA contractors

1.2 Why has NASA integrated the IDP and SATERN?

- *NASA's policies support the enhancement of employee skills and the importance of employee development.*
 - NASA Policy Directive (NPD) 3410.2F states that NASA supervisors and their direct reports are responsible for "assessing current capabilities, determining near- and long-term development and training to enhance employee performance, and preparing IDP that support job requirements to include timely completion of supervisory and management training, career goals, and the agency needs."
- *The SATERN IDP offers real-time information through automatic integration with the learning management system.*
 - Since the IDP is integrated with the SATERN learning management system, completed learning events will be automatically recorded in both the Learning History and the IDP with ease. The IDP functionality in SATERN is used for recording and documenting training and development activities, and its use should be preceded by face-to-face career development conversations between an employee and their supervisor.
- *The greatest benefit is efficiency, as the IDP is available electronically for review and approvals by coaches and supervisors.*

1.3 Who is involved in the process?

Your **Supervisor** is responsible for:

- Working with you to evaluate skill gaps and development needs
- Helping you identify training resources and developmental activities
- Meeting with you to discuss draft IDPs
- Providing feedback on the IDPs

- Approving your IDP and supporting your training and development

Supervisor-employee communication is key to the success of the IDP process.

If you have a **Coach** or **Mentor**:

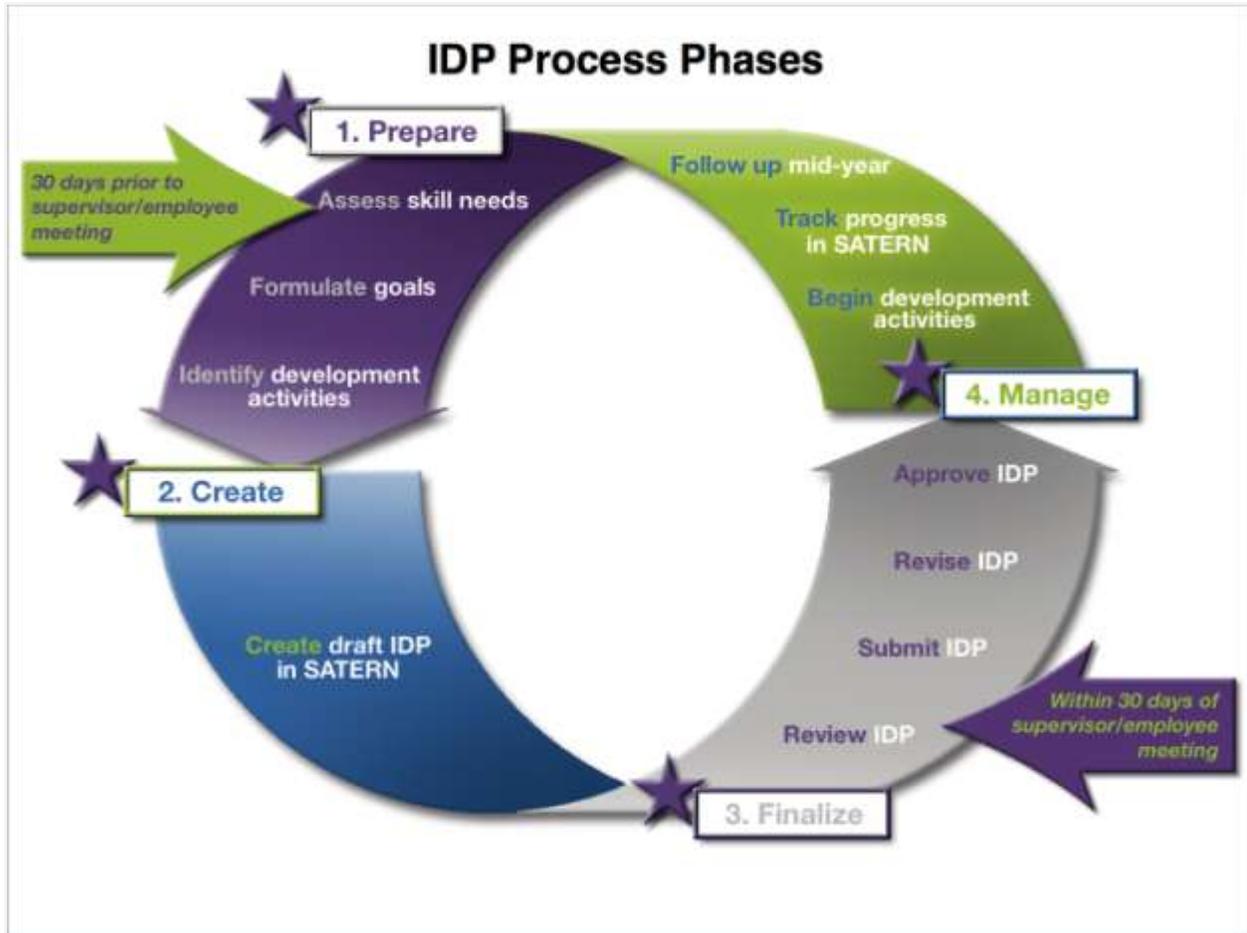
- Coaching or mentoring programs at NASA can help to improve your capabilities.
- The selection of a coach or mentor is optional and may not be applicable to you.
- If you select a Coach in your Personal Profile, he/she will be able to view your IDP in SATERN at any point.
- It is your responsibility to request an IDP review by your coach or mentor.
- Coaches and mentors can offer comments on the IDP, but cannot approve or activate the IDP in SATERN.

The Agency acknowledges a distinction between the role of mentors and coaches. For the purpose of this IDP Guide, the term mentor will be used to refer to both mentors and coaches. Similarly, the term mentee will refer to both mentees and coaches.

1.4 IDP Process Phases

The IDP is divided into four phases:

1. Prepare
2. Create
3. Finalize
4. Manage



This Guide discusses the entire IDP process flow in detail, providing step-by-step instructions on how to complete each phase. Some steps of the IDP Process are performed in SATERN while some are not, but ALL are important.

2 General Instruction

2.1 For the Supervisor

While the employee is primarily responsible for career planning, an IDP is jointly developed by an employee and his or her supervisor. The supervisor's role during employee and supervisor IDP discussions is to listen, ask questions, and offer suggestions to help the employee develop a written career plan.

Prior to meeting with the employee you should consider:

- Your employee's current position and experience.
- The knowledge, skills, and abilities the employee might need to address for optimum performance of job duties.
- Development assignments that might accomplish training and development objectives in lieu of formal training.

Note: Developmental assignments are activities approved by the employee's management, which could include work assignments in their home organization, outside their normal work duties, and special assignments or projects outside their home organization (e.g., Center/Agency teams, special projects, details, rotation assignments, Source Evaluation Boards (SEB), etc.).

- Short-, mid-, and long-range goals for the employee and the training and development needed for the employee to reach those goals, taking into consideration the organization's, Center's, and Agency's goals.

1. During the Pre-planning Discussion:

- Discuss short-, mid-, and long-range goals in relation to training and development.

Note: If a career change is desired, you may wish to refer your employee to appropriate resources (e.g., HR Development Office, Administrative Officer, mentor, or someone in the desired career field).

- Be open and positive.
- Work with the employee to evaluate skills gaps and development needs.
- Help employees to identify training resources and developmental activities.
- Discuss the Draft IDPs.
- Provide feedback on the IDPs.

2. Approval and Validation:

- Approve the IDPs and support the employee's efforts in participating in training and development activities.

2.2 For the Employee

While an IDP is jointly developed by an employee and their supervisor, the employee is primarily responsible for his or her career planning. Dialogue with the supervisor is important throughout the development and implementation of an IDP.

The Individual Development Planning process is inherently connected to, and should be completed in conjunction with, an employee's annual performance appraisal and development of new performance standards and elements. IDPs should be used to plan developmental experiences (e.g., details, course work, special projects, on-the-job training, education, career development, etc.), which may change from year-to-year as the mission of the organization evolves.

1. Prior to meeting with your supervisor, consider the following questions during the preparation stage:
 - a. What are my short, mid, and long range goals?
 - b. What skills/experiences do I need to improve performance in my current job?
 - c. What activities identified as part of a Center or an Agency Development program are required or relevant to my needs?
 - d. Where does my individual developmental needs fit in with the goals of my organization, the Center, and the Agency?
 - e. What activities will support my short-, mid-, and long-range goals?
 - f. What training is projected to be offered onsite? (See SATERN online course catalog)
2. Develop a written draft of your IDP, taking into consideration the following:
 - a. What are my priorities?
 - b. Are training and developmental activities realistic for the time frame of the IDP?
 - c. Do I meet the qualifications for identified activities (e.g., grade, experience, etc.)?
3. Meet with your supervisor and/or mentor to discuss.
4. Begin building IDP in SATERN.
5. Finalize the IDP and submit for approval.
6. Periodically update completion status on activities and goals.

If the IDP is followed closely, you will see that there is no definite end. As you implement your plans, you move closer to your goals and identify new needs and possibly more defined goals. You are acquiring the knowledge, skills and abilities you need to fulfill your potential and increase the level of communication between you and your supervisor.

Some organizations may have developed an occupational development program(s) or have identified a targeted training and development curriculum that is specific to the nature of work that is carried out by that organization. They typically contain a listing of training courses and

developmental assignments that have been identified as relevant to a specific occupation or organization and typically the organization's Training Coordinator can aid employees in identifying training and developmental activities on the IDP.

2.3 Are You Ready to Begin

SATERN IDP Planning Checklist

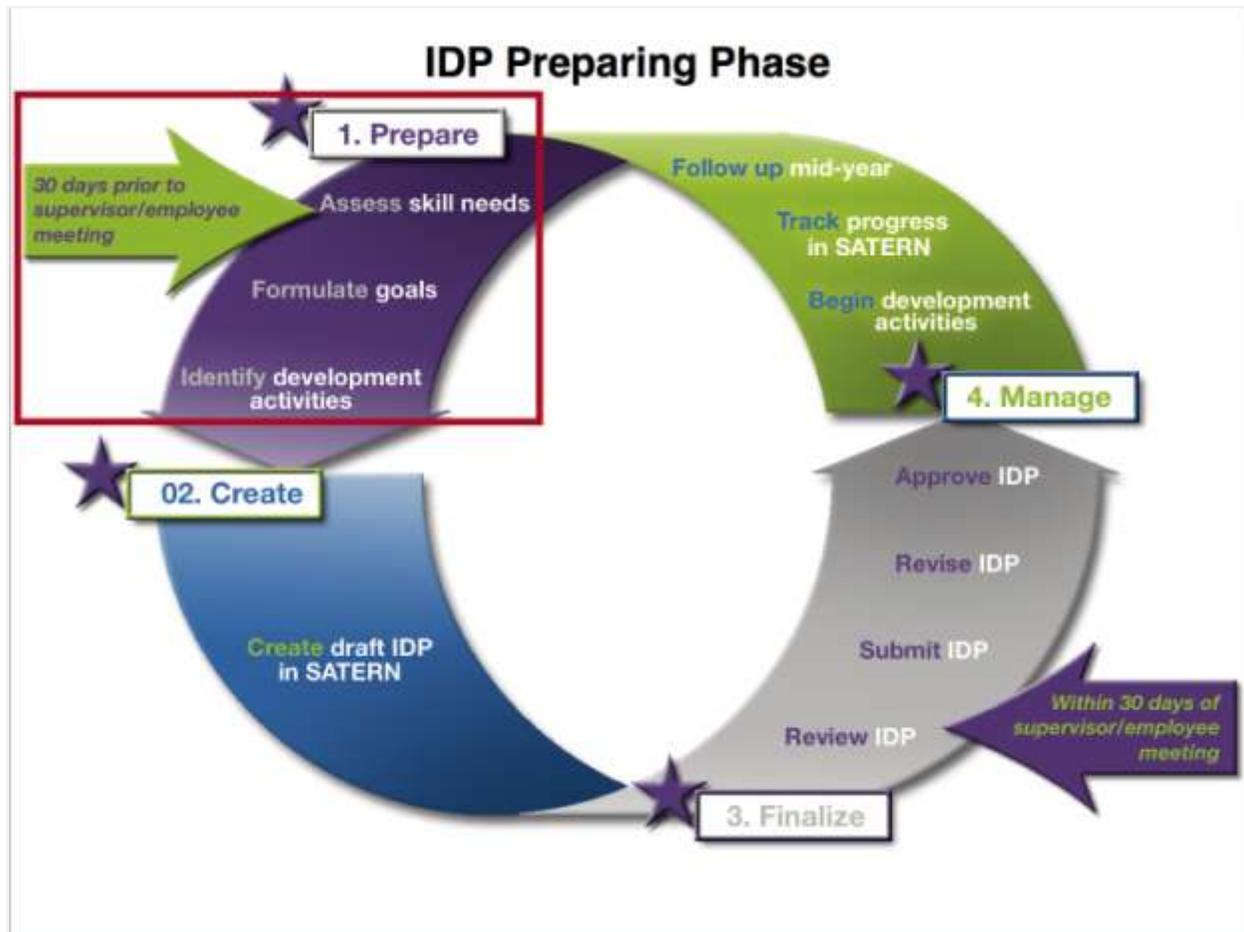
This checklist is intended to serve as a guide as you prepare to create your IDP. The following questions are designed to help you think through the goals and activities sections of the IDP:

- Have you thought about your professional goals and how to reach them?**
 - Where would you like to be professionally in two years? In five years? In ten years?
 - What knowledge, skills, abilities, and/or NASA competencies do you need to develop in each of these timeframes in order to get where you want to go?
 - What training or other development opportunities can help you achieve those goals? (for example training activities, development programs, rotations, etc.)?

- Have you met with your supervisor to discuss your goals and receive input?**

- If applicable, have you asked your coach/mentor to provide comments on your IDP?**
 - Your *coach* or *mentor* can be someone with whom you have a formal relationship, such as in a career development or mentoring program, or a colleague whose opinions you value and whose input you would like on your IDP. Either way, it is critical to ask his or her permission in advance.

3 PHASE 1: Prepare for Your IDP



What is Included in this Phase?

- The Individual Development Planning process begins with planning and preparation.
- In this phase, you gather information that you will need to draft your development plan.

There are 3 steps in the Prepare phase:

- Assess skill needs
- Formulate goals
- Identify development activities

Time spent in planning prepares the groundwork for a realistic and worthwhile IDP.

3.1 Assess Skill Needs

The first step in preparing for your IDP is to evaluate your skills and abilities. Your IDP generally reflects development needs for your *current* job position as well as positions that may be of interest to you in the *future*.

- Work with your supervisor to assess your skills and compare to those needed for your current job.
- Identify any *gaps* between current competencies and those required to perform your job functions.

List the skills and knowledge you need to:

- Enhance your performance in current position or field of expertise
- Address changes in your job role or in the strategic direction of your organization
- Prepare yourself for advancement to another position
- Discuss which areas you should focus on with your supervisor or coach

Checkpoint: Are You Ready to Formulate Goals?

- ✓ You have determined your skill gaps for both job-specific (technical) expertise and overall development.
- ✓ You have identified the skills, knowledge, and competencies you require and set priorities regarding which areas you want to develop.
- ✓ You have talked with your supervisor and your coach or mentor (if applicable) about your development needs.

3.2 Formulating Goals

For the skill needs identified above, you will create realistic development goals that you hope to achieve.

For each goal, determine if it is:

- **Short-Range** - Goal you plan to achieve within the *next year*
 - Often focus on development related to your current job assignment or technical/job specific skills needed now
- **Mid-Range** – Goal you intend to achieve in *2-4 years*
 - Often development objectives important for growth within your present position or for developing a new skill or area of knowledge
- **Long-Range** – Goal you wish to achieve in *5 years and beyond*
 - Often development goals that reflect career aspirations, taking on greater responsibility, or moving to a new area of work

An IDP is designed to be a blueprint for your success.

Some Centers and Leadership Programs specify the date period for IDPs. You may be required to select:

- **Calendar Year:** January 1 – December 31
- **Performance Year, 1 year:** May 1 – April 30
- **Performance Year, 2 years:** May 1 – April 30

- **Performance Year, 3 years:** May 1 – April 30
- **SES/ST/SL Programs:** October 1 – September 30

Ask your Center Training Office if a certain date period is required. If none is specified, you may choose one of the date periods specified above.

Checkpoint: Are You Ready to Identify Development Activities?

- ✓ You have outlined development objectives for *each* of your skill needs.
- ✓ You have determined the timeframe for development (short-range, mid-range, long-range) for each of your development objectives.
- ✓ You have determined the time period for your IDP.
- ✓ You have discussed your development goals with your supervisor and your coach or mentor.

3.3 Identifying Development Activities

The last step of the **Prepare** phase is to define the strategies you will use to achieve your development goals.

- Opportunities for development can take on many forms; consider a range of development activity options
- For each of your development objectives, determine what strategies would best meet your needs
- Consider your learning style and timeframe
- Use SATERN to research available courses and reference materials

Examples of Activities
➤ Certification
➤ Formal Training
➤ Job Rotation
➤ On-the-Job Training
➤ Self-directed Learning
➤ Reading Books
➤ Online Courses
➤ College Classes
➤ Shadowing
➤ Mentoring
➤ Cross-Training

You will also have the option to assign a **priority rating** to indicate the importance of each goal and activity in your IDP.

For each goal and activity determine if the priority is:

- **High** – Development necessary and directly linked to job assignments, job-specific skill sets, and will likely lead to improved job performance and ability to accomplish mission objectives.
- **Medium** – Necessary to accomplish organization strategic goals and objectives, not directly needed to perform job responsibilities, but would improve and enhance job performance.
- **Low** – The development activity supports goals not directly related to your current job description, but will appreciably improve your skill set.

Priorities should be assigned to both goals and activities.

In addition, you will have the option of five categories to group your goals in your IDP:

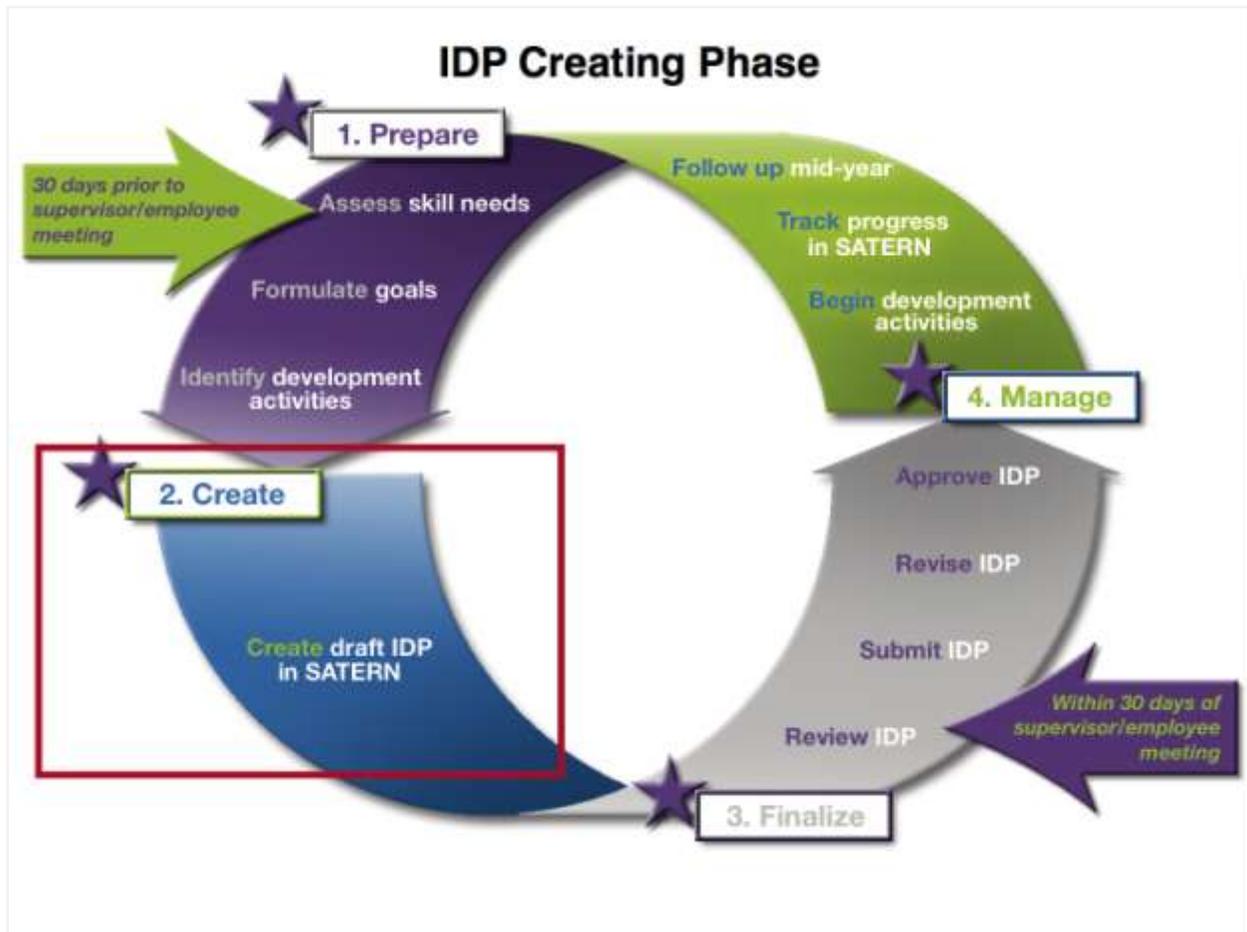
- **Academic Goals** – Goals that identify or relate to an academic activity.
- **Leadership Development Goals** – Goals that identify or relate to a capacity to lead, direct, or manage.
- **Personal Growth and Development Goals** - Goals that identify or relate to individual or self improvement.
- **Professional Development Goals** - Goals that identify or relate to career advancement or progress aimed to enhance knowledge, skills, or abilities.
- **Other Goals** – Goals that do not readily identify or relate to Academic Goals, Leadership Development Goals, Personal Growth and Development Goals, or Professional Development Goals.

Checkpoint: Are You Ready to Create Your Draft IDP?

- ✓ You have determined the strategies you will use to achieve your goals.
- ✓ You have identified development activities for *each* of your development goals.
- ✓ You have determined the priority (*High, Medium, or Low*) for each of your goals and activities.
- ✓ You grouped your goals by categories (e.g., Academic, Professional Development).
- ✓ You have set realistic target dates for accomplishing your activities.

This information can be used to complete your draft IDP in SATERN.

4 PHASE 2: Create Your IDP



What is included in this Phase?

This phase includes all of the steps involved in creating your IDP.

It includes information on:

- Navigate to the IDP in SATERN
- Create a new plan
- Enter plan information
- Add goals to your plan
- Add development activities to your plans

Time spent in planning prepares the groundwork for a realistic and worthwhile IDP.

4.1 Add a Coach or Mentor

When you log in to SATERN, your **Personal** tab will display.

- If you have a coach or mentor that you want to review your IDP, click on the **Profile** section of the **Personal** tab.



1. Click on the pencil icon to add or change your Coach/Mentor
2. Click on the yellow **Employee Information** box to edit
3. Browse to find your coach/mentor, select, and click **Save**



4.2 Verify your Supervisor

Check your supervisor to ensure it is the correct one.

- If not, correct and set the **Supervisor By-pass Flag** to **Y (Yes)**

Edit Employee Information

* Required Field(s)

Supervisor:

Organization:

Coach/Mentor:

Supervisor By-pass Flag:

N (No)
Y (Yes)

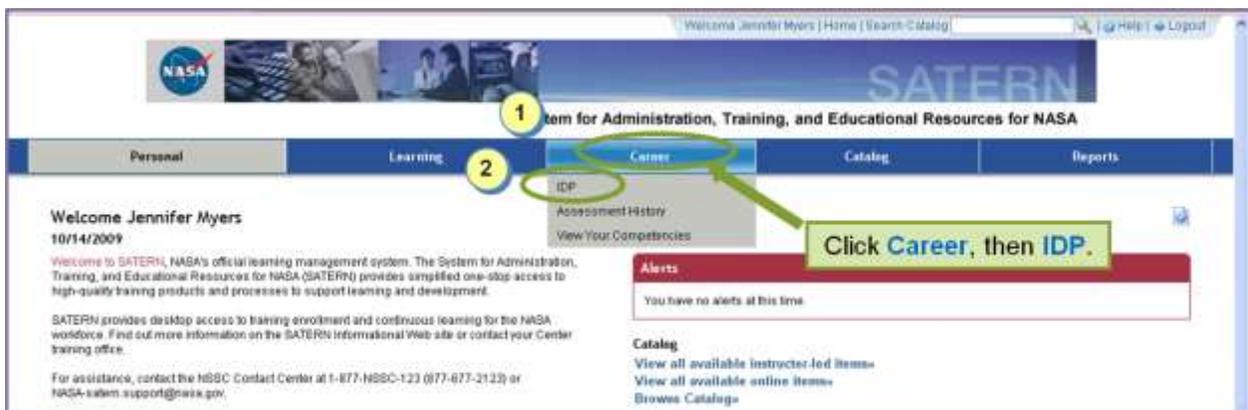
Save Cancel

Employee Information

User ID: jfmyers
Employee Type: Civil Service Employee
Supervisor: CINDY R STEELE

4.3 Navigate to IDP

You will find the IDP under the **Career** tab, which is located in the center of the SATERN navigation bar.



Note: The View Your Competencies selection allows you to view your competency assignments from NASA's Competency Management System (CMS).

4.4 Create a New Plan

Now that you've navigated your way to the IDP, it's time to create your plan.



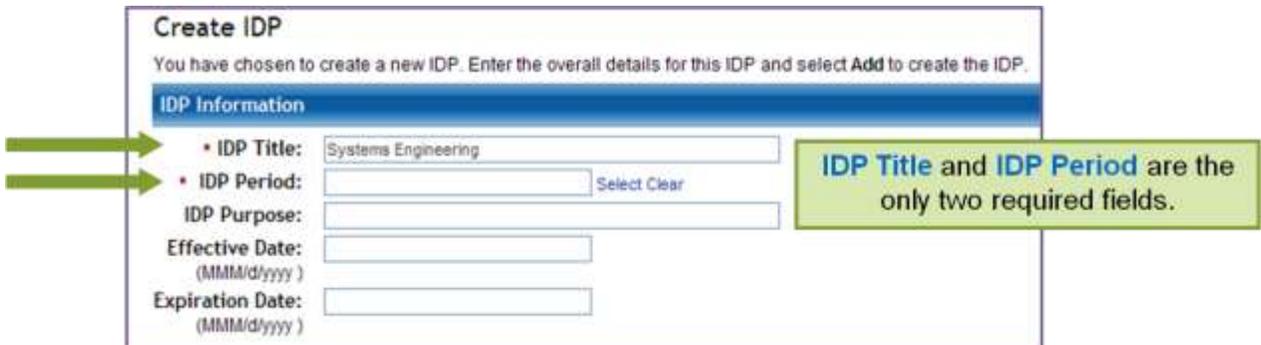
The screenshot shows the SATERN System for Administration, Training, and Educational Resources for NASA. The user is logged in as Jennifer Miers. The main navigation bar includes Personal, Learning, Career, Catalog, and Reports. Below this, there is a section for IDPs with instructions on how to view, edit, or create a new IDP. A green circle highlights the 'Create New IDP' button, and a green arrow points from a callout box below to this button.

Click **Create New IDP**.

4.5 Enter Plan Information

The IDP system requires that you provide some information about your new plan.

- This information will help you find your plan in the future and make sure your plan is active on the correct date.



The 'Create IDP' form is displayed, showing the 'IDP Information' section. The 'IDP Title' field contains 'Systems Engineering' and the 'IDP Period' field has a 'Select Clear' button. Two green arrows point to the 'IDP Title' and 'IDP Period' fields. A callout box to the right states: 'IDP Title and IDP Period are the only two required fields.'

Note: The IDP Title should be intuitive, so that others (e.g., supervisor, coach) can identify this plan.

Standard date periods are provided for selection:

Create IDP

You have chosen to create a new IDP. Enter the overall details for this IDP and select **Add** to create the IDP.

IDP Information

• **IDP Title:**

• **IDP Period:**

IDP Purpose:

Effective Date:
(MM/DD/YYYY)

Expiration Date:
(MM/DD/YYYY)

1

Date Periods > - Mozilla Firefox

https://nasa58.gpehosting.com/plateau/search/initSearch.do?searchType=0&selectorName=DatePeriod&stackID=

Date Periods

> Search Results

Search

View Item Results

Records per Page 10 (5 total records)

Date Period ID	Description	Select
CY 2010	Calendar Year 2010	Select
Leadership Programs FY 2010	Leadership Programs - Fiscal Year 2010	Select
PY 2009 - 1 Year	Performance Year 2009 (1 year)	Select
PY 2009 - 2 year	Performance Year 2009 (2 year)	Select
PY 2009 - 3 year	Performance Year 2009 (3 year)	Select

Records per Page 10 (5 total records)

2

The **IDP Period** is the time period during which you intend to reach the goals on the plan. Standard date periods are provided for selection.

Note: Ask your supervisor or Center Training Office if a certain date period is required.

Finish creating your Plan:

- Confirm or change the **Effective** and/or **Expirations Date/s**.
- Click **Add** when finished.

The screenshot shows the 'Create IDP' form with the following fields and values:

- IDP Title: Systems Engineering
- IDP Period: Performance Year 2009 (1 year)
- IDP Purpose: To support a shift to systems engineering
- Effective Date: 5/1/2009
- Expiration Date: 4/30/2010

Annotations include:

- Green arrows pointing from the IDP Period field to the Effective Date and Expiration Date fields.
- A green box with text: "Effective Date and Expiration Date will automatically fill, based on the selected IDP Period."
- A green box with text: "Click Add." pointing to the 'Add' button.
- The 'Add' button is circled in green.

Note: IDPs created before December 2009 will not have date periods, only expiration dates.

Let us quickly review:

- If applicable, you added a **Coach/Mentor** to your profile
- You created a new plan that contains the necessary plan information: **IDP Title** and **IDP Period**.
- Your **Plan Information** is complete.

The screenshot shows the 'My IDPs and Goals' page with the following details:

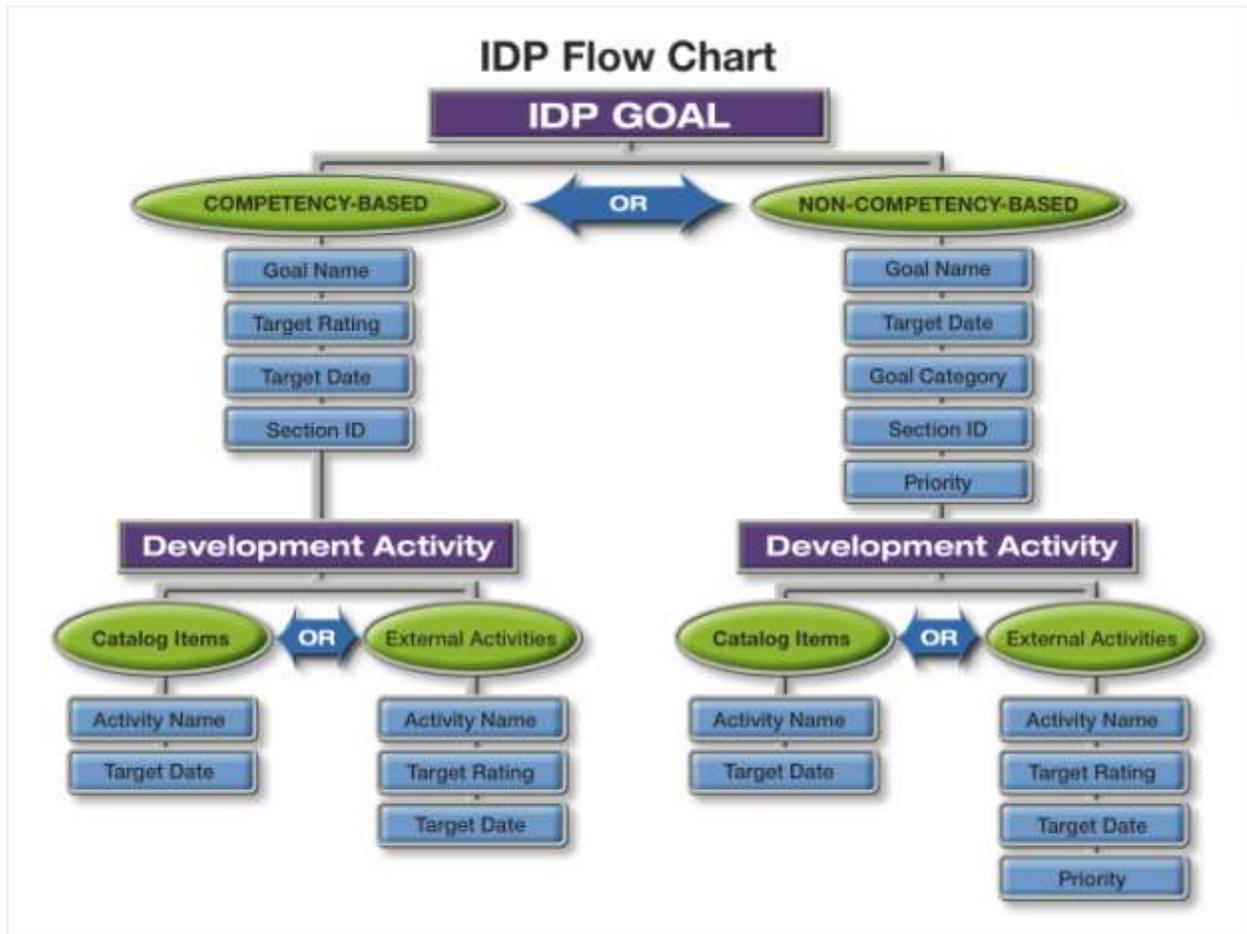
- IDP Title: Systems Engineering (Select Other IDP)
- IDP Period: Performance Year 2009 (1 year)
- IDP Purpose: To support a shift to systems engine
- IDP Status: Draft
- Version: 0 (current)
- Effective Date: 5/1/2009
- Expiration Date: 4/30/2010

Buttons at the bottom: Print IDP, List all IDPs, View/Add Notes, Save, Submit for Approval

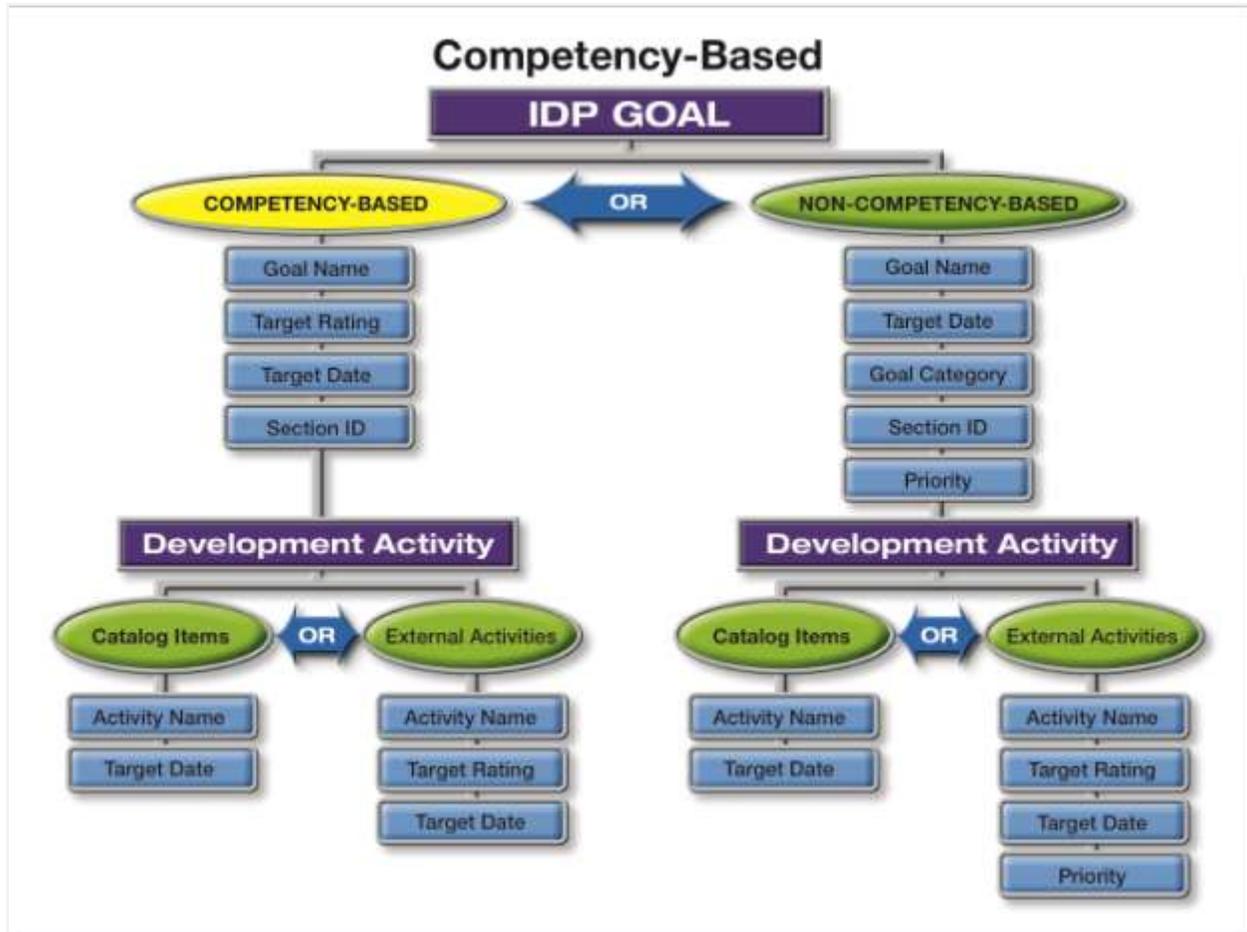
4.6 Adding Goals and Activities

The next step in creating your plan is to add goals. You need to have at least one goal with at least one activity for each goal to submit your IDP for approval. If you created IDPs previously in SATERN, you will be able to copy goals and activities from your other IDPs:

There are two types of goals: **Competency-based** goals and **Non-competency based** goals.



4.6.1 Add a Competency-Based Goal



The intent of a competency-based goal is to build skills or develop expertise in a NASA competency from the CMS.

The screenshot shows the 'My IDPs and Goals' interface. The 'Development' tab is active. A green box highlights the 'New Goal' button in the bottom right corner. A callout box with an arrow points to it, containing the text: "Click New Goal in the Development tab."

Use the IDP **Goal Wizard** functionality to create competency-based goals:



The first thing you will be asked to do is to select your **Goal Type**.

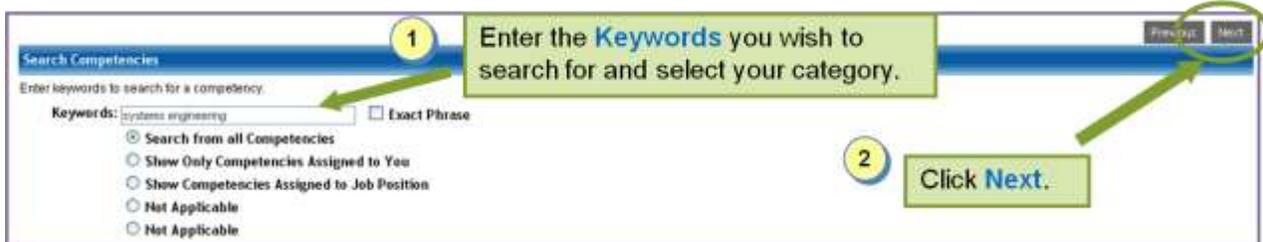
Selecting **Competency** will allow you to search the CMS dictionary and choose a CMS competency on which to base your plan.



When you choose a competency-based goal, you will search the CMS dictionary or catalog by entering **Keywords**.

You can choose to:

- **Search from all Competencies** within the CMS catalog
- **Show Only Competencies Assigned to You:** this includes competencies assigned to your job ID and competencies you have added to your CMS profile
- **Show Competencies Assigned to Job Position:** this includes competencies related to a specific job ID



When the keyword search returns selections, choose the best fit:

Goal Wizard
 Choose Goal Type → Search Competencies → **Select Competencies**
 The list below contains the results from your competency search. Select the competency or competencies you wish to add as goal(s) to your IDP to continue, or choose **Previous** to go back and modify your search criteria.

Keywords: systems engineering
Exact Phrase: No
Your Competencies Only: No
Job Position: (none specified)
Subject Area: (none specified)
Competency Profile: (none specified)

Competency Search Results

Competency Description	Current Assessed Rating	Required Rating	Goal	Select
Computer Systems and Engineering	0.0	4.0	Current 1.0 Req:1	<input type="checkbox"/>
Systems Engineering	0.0	4.0	Current 1.0 Req:1	<input checked="" type="checkbox"/>
Systems Integration Engineering	0.0	4.0	Current 1.0 Req:1	<input type="checkbox"/>

Annotations:
 1. Click to **Select.** (points to the 'Select' button)
 2. Click **Next.** (points to the 'Next' button)

In order to finish adding this goal, you need to enter **Goal Details**.

There are four required fields:

- **Goal Name** will default to the competency name, but you can rename it if you wish
- **Target Rating** should always be listed as '1'
- **Target Date** is the date by which you want to achieve the goal
- **IDP Section ID** is the time range to achieve the goal

Confirm or enter the required goal information.

Goal Details

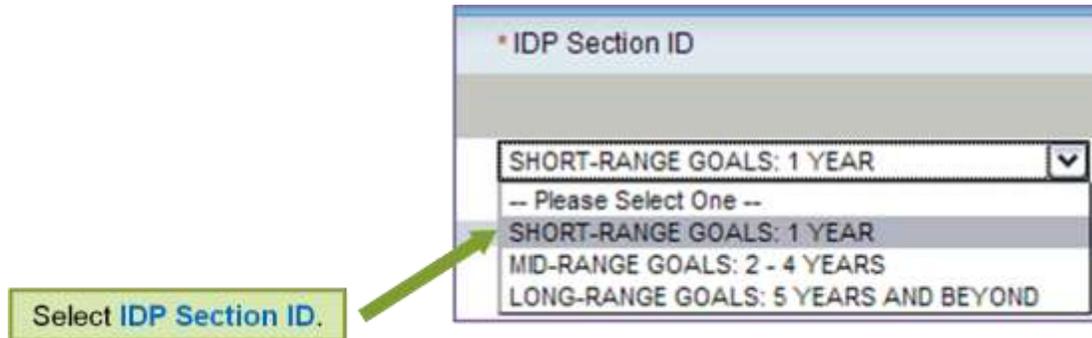
Competency	Goal Number	* Goal Name	Last Assessment	* Target Rating (1-5)	Stretch Rating (1000)	* Target Date (MM/DD/YYYY)	* IDP Section ID	Priority	Selected to Add	Create Activities
Systems Engineering		Systems Engineering	0.00	1			-- Please Select One --		<input checked="" type="checkbox"/>	<input type="checkbox"/>

Note: You can set the Priority after you Save the Goal by clicking Edit.

IDP Section ID

You can create short-, mid-, or long-range goals, though you are not required to have all three in your plan.

- Begin with adding a **Short-Range Goal**. This is a goal that you want to achieve within the next year.



Once you have completed your goal information, click **Done**.



Let's quickly review:

- You searched through the CMS dictionary for a competency on which you wished to base your goal
- You entered the **Goal Details** required by the IDP tool, including the **Section**

You have now completed the addition of a **competency-based goal**.

Development Activities

In order to reach your goals, you will need to engage in some kind of expertise or skill-building activity. In the IDP, these are called **Development Activities**. The IDP tool requires that you add at least one such development activity to each goal.

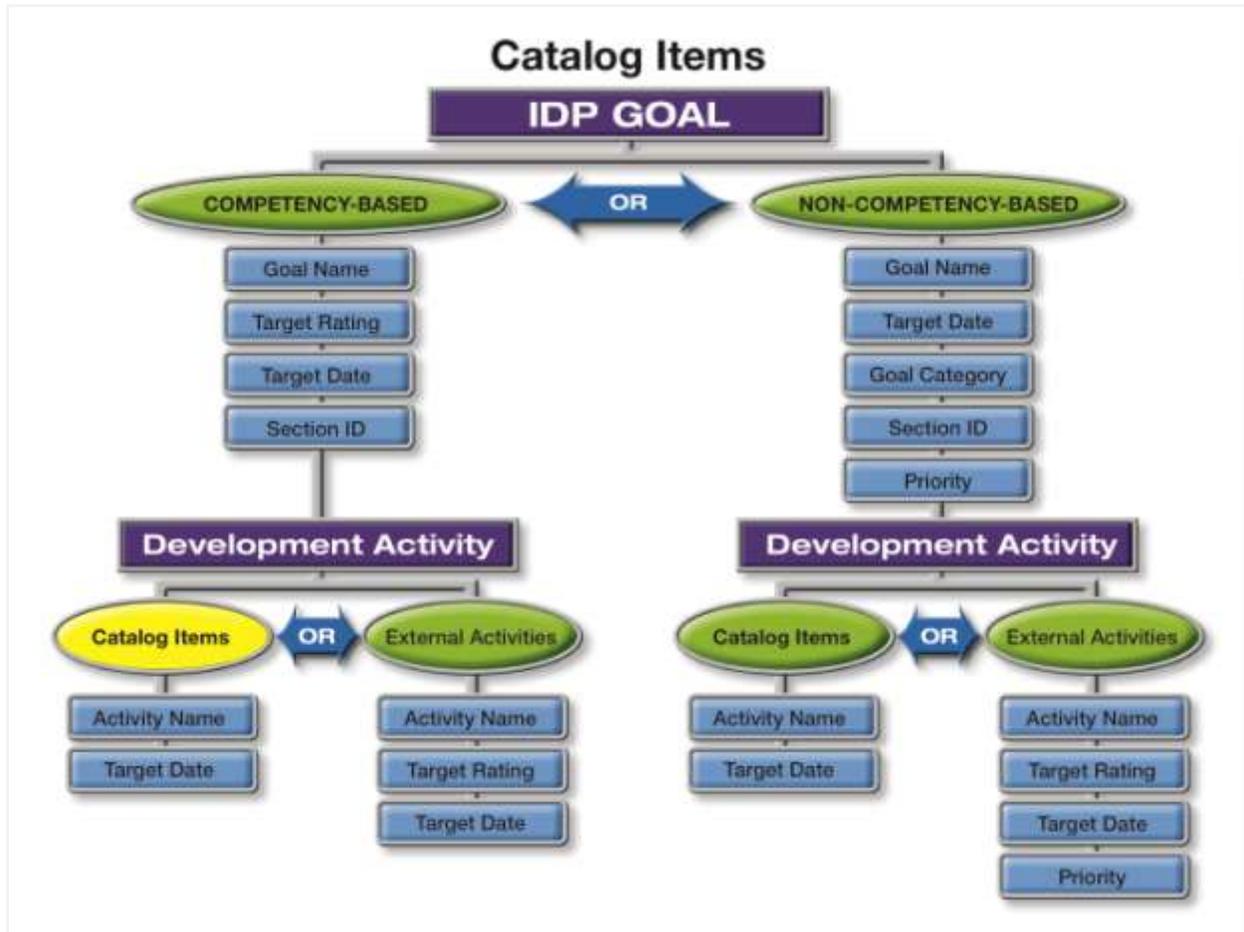
There are many different types of development activities, including, but not limited to:

- Coursework
- On-the-job training
- Attending professional conferences

In the IDP tool, development activities fall into two categories:

- **Catalog Items:** consist of SATERN catalog items
- **External Activities:** include everything else

4.6.2 Add a Competency-Based Catalog Item



Go back to the goal you have just created.

Notice the ► symbol next to the **Goal Name**.

- Clicking this button will open up the activities section for this goal.

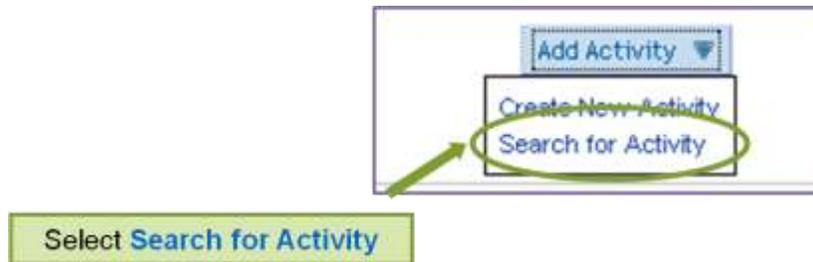


The activity menu will drop down below the goal.



You will be asked to select a development activity type.

- Selecting **Search for Activity** will allow you to search the SATERN catalog for applicable development activities.



At this point, you may search the entire SATERN catalog for items that will help you achieve your goal.

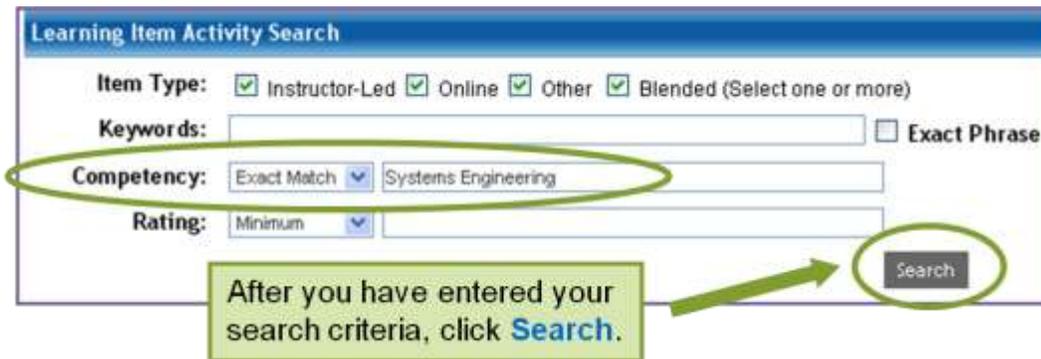
You can search using any of the following criteria:

- **Keywords** – Including SATERN course title and description
- **Competency** – Only technical and business competencies from the CMS dictionary have been assigned to learning items



This example shows a search for SATERN catalog items by competency.

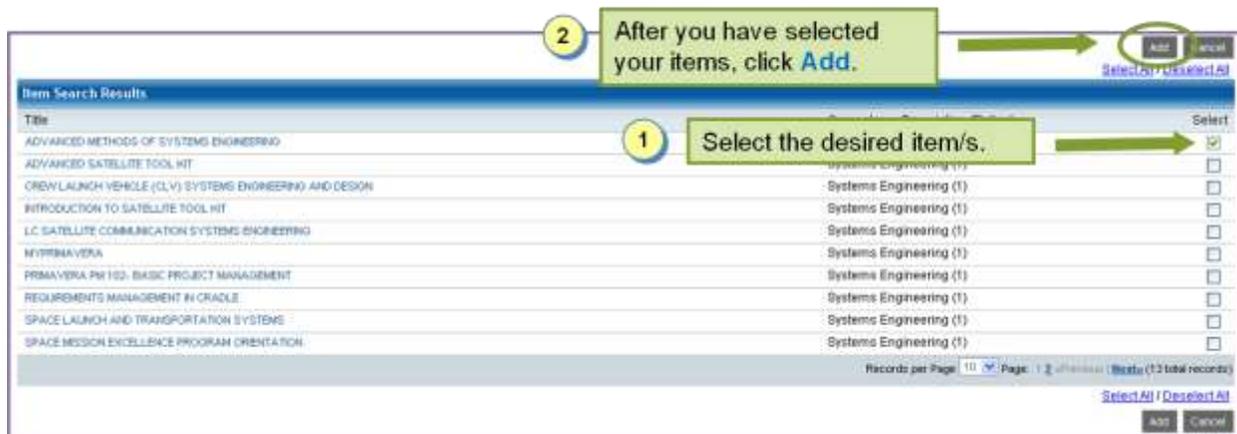
If you are adding a catalog item to a competency-based goal, the competency-based goal will automatically appear in the **Competency** field.



Note: For a broader search, you may need to remove the competency that populates automatically.

Be aware that competencies have not been assigned to all learning items.

If you perform a search based on a competency, it is possible that the results may not show all relevant courses, and you may wish to broaden your search.



At this point, you are able to enter **Development Activity Details**:



There are two required fields:

- **Activity Name** will default to the item name, but you can expand it to be more descriptive if you choose
- **Target Date** will default to the plan expiration date, but you can change it to any date by which you want to complete the activity

A screenshot of a web application form for confirming activity information. At the top, a table lists item details: Name (ADVANCED METHODS OF SYSTEMS ENGINEERING), Due Date (9/30/2010), Type (Catalog Item), Priority, and Target/Stretch. Below the table, a green box contains the text "Confirm or enter the required activity information." The form fields include: Activity Name (ADVANCED METHODS OF SYSTEMS ENGINEE), Related Item (ADVANCED METHODS OF SYSTEMS ENGINEERING), Target Date (9/30/2010), and Priority (a dropdown menu). Buttons for "View/Add Notes", "View Item Details", "Apply Changes", and "Cancel" are visible.

You are also able to add a **Priority** for these activities:

1. **High**: Focuses on development directly related to your current job assignment, technical and/or job-specific skill sets, and support organizational goals
2. **Medium**: Necessary to accomplish organizational mission objectives, or needed to carry out your job responsibilities
3. **Low**: May or may not be directly related to your current job description, but will appreciably improve your skill set

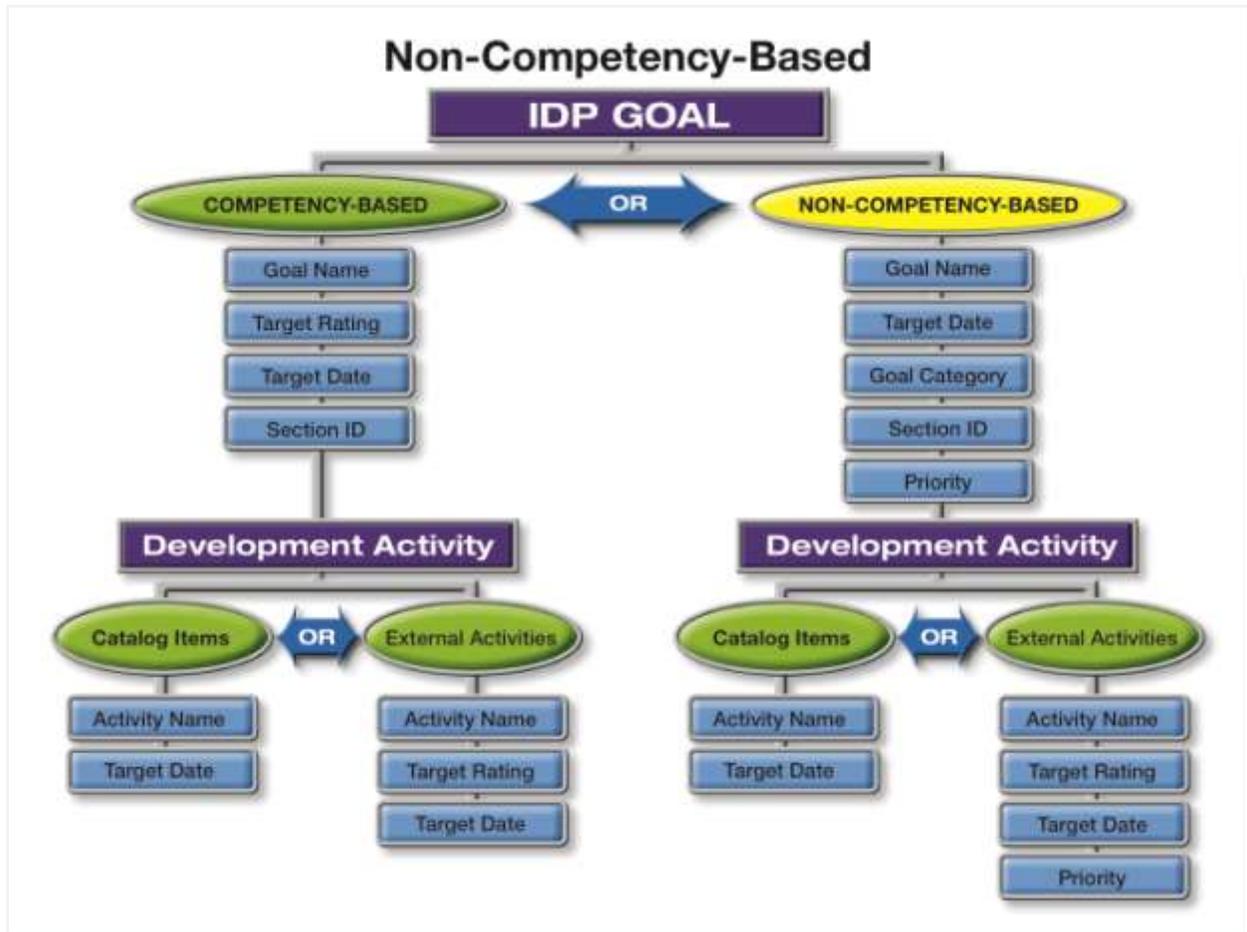
A close-up screenshot of the Priority dropdown menu. The menu is open, showing three options: "1 - HIGH (Directly related to current assignments)", "2 - MEDIUM (For mission objectives/job requirements)", and "3 - LOW (Improve skill set/may not be current job)". A green arrow points to the dropdown. Below the menu, a green box contains the text "Enter the Priority level for these items." and another green box contains the text "Once you have entered your activity details, click Apply Changes." The "Apply Changes" button is circled in green.

Let us quickly review:

- You searched through the SATERN catalog for items related to your competency
- You entered the development activity details required by the IDP tool
- You assigned a priority level to your development activity

You have now completed the addition of a **catalog item development activity**.

4.6.3 Add a Non-Competency Based Goal



Now you have created a competency-based goal, and added catalog items from SATERN to support your achievement of that goal.

You also have the option to add goals that are not based on competencies. In the next several pages, you will learn how to add a non-competency-based goal to your plan.

In the **Development** tab, click **New Goal**:



Now you are ready to complete the details of your goal.

First, add the **Goal Name** and the **Goal Description**:

- Goal Name is the name you choose to give this goal

Goal Name is a required field.

You are also able to select a **Goal Category** to provide an optional means of grouping goals:

- **Academic Goals** – Goals that identify or relate to an academic activity.
- **Leadership Development Goals** – Goals that identify or relate to a capacity to lead, direct, or manage.

- **Other Goals** – Goals that do not readily identify or relate to Academic Goals, Leadership Development Goals, Personal Growth and Development Goals, or Professional Development Goals.
- **Personal Growth and Development Goals**—Goals that identify or relate to individual or self improvement.
- **Professional Development Goals**—Goals that identify or relate to career advancement or progress aimed to enhance knowledge, skills, or abilities.

You can create **Short-, Mid-, or Long-Range** goals, though you are not required to have all three in your plan:

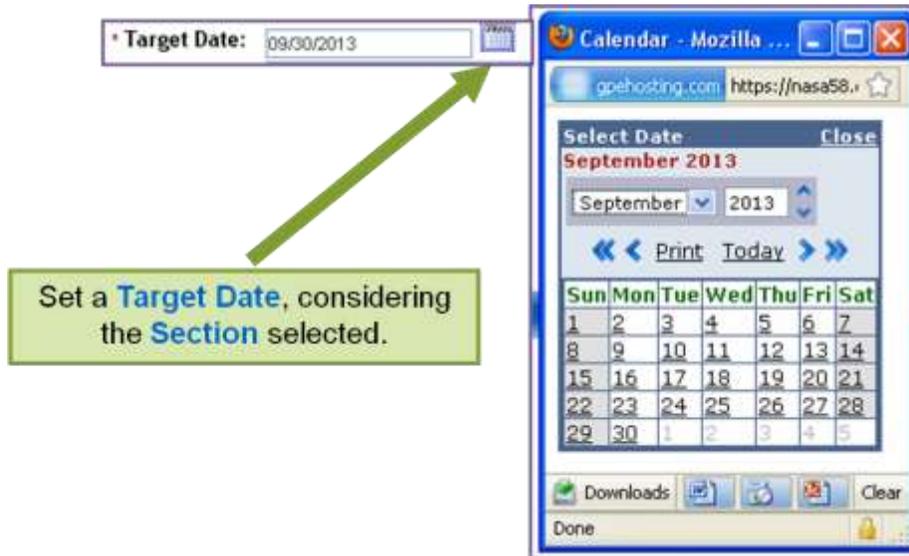
- **Short-Range** - Goal you plan to achieve *within the next year*
 - Often focus on development related to your current job assignment or technical/job specific skills needed now
- **Mid-Range** – Goal you intend to achieve in *2-4 years*
 - Often development objectives important for growth within your present position or for developing a new skill or area of knowledge
- **Long-Range** – Goal you wish to achieve in *5 years and beyond*
 - Often development goals that reflect career aspirations, taking on greater responsibility, or moving to a new area of work

You are also able to add a **Priority** for this goal.

1. **High** – Development necessary and directly linked to job assignments, job-specific skill sets, and will likely lead to improved job performance and ability to accomplish mission objectives.
2. **Medium** – Necessary to accomplish organization strategic goals and objectives, not directly needed to perform job responsibilities, but would improve and enhance job performance.
3. **Low** – The development activity supports goals not directly related to your current job description, but will appreciably improve your skill set.

Finally, select your **Target Date**:

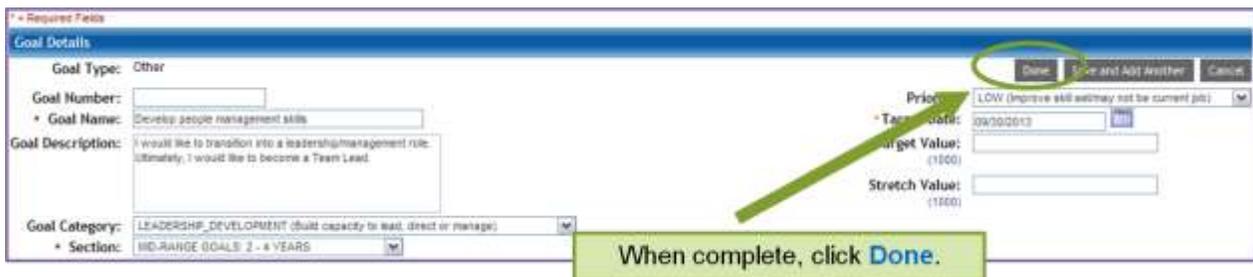
- **Target Date** is the date by which you want to achieve the goal.



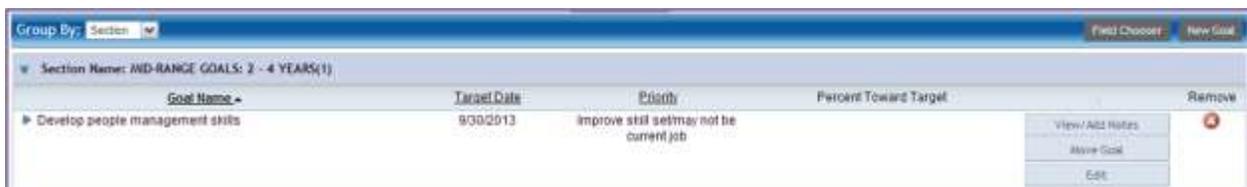
Let's quickly review

The required fields of our goal to Develop people management skills:

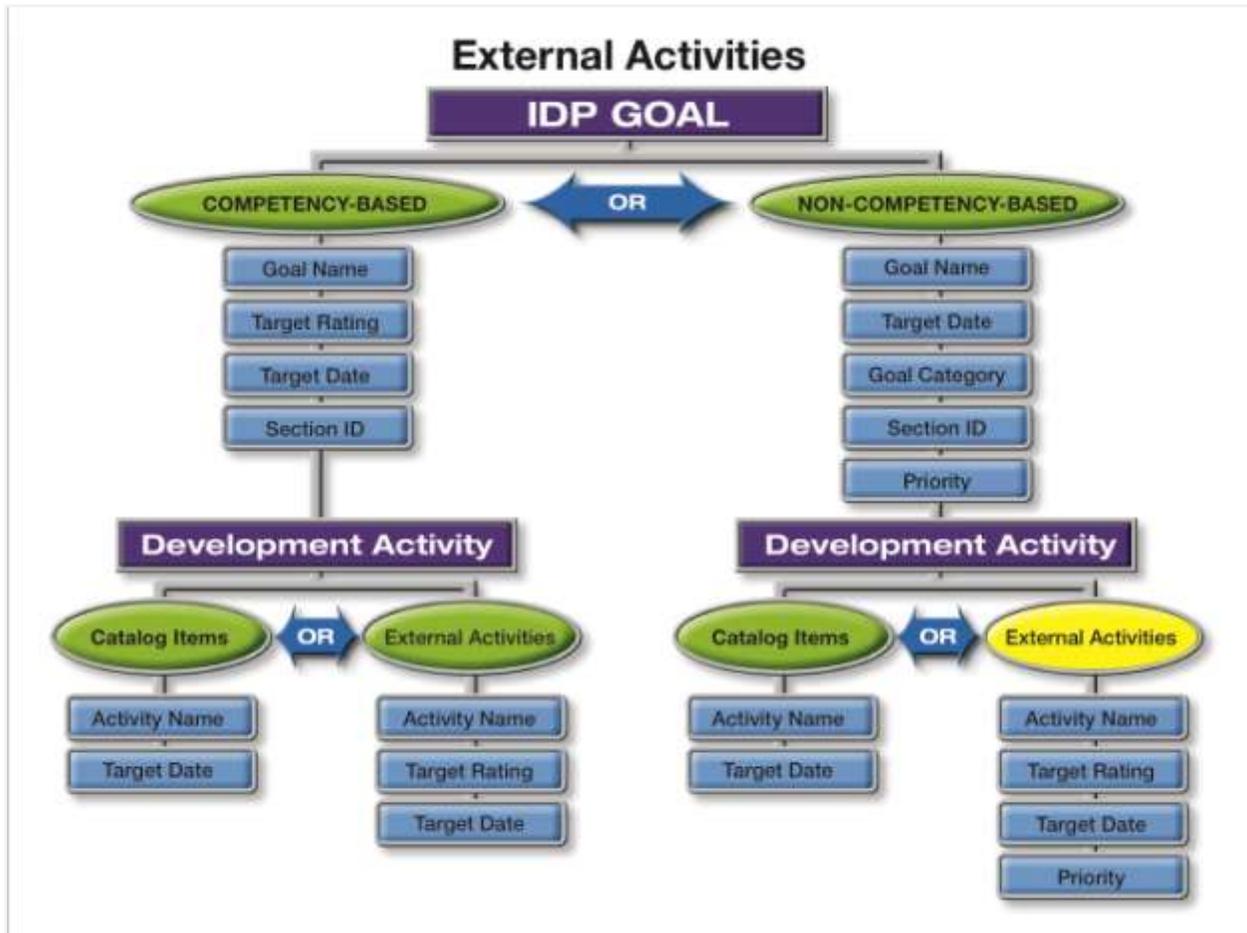
- Goal Name
- Section
- Target Date



You have now completed the addition of a **non-competency-based goal**.



4.6.4 Add an External Activity

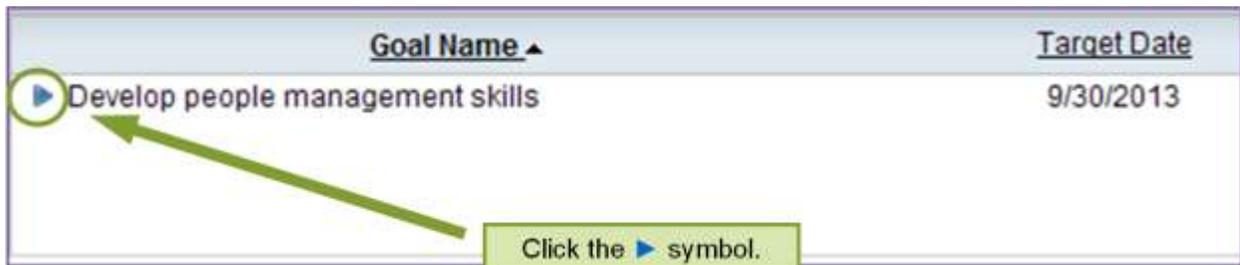


SATERN catalog items are an effective way to build skills, but there are many other options available, including, but not limited to, academic courses, professional conferences, and seminars.

In order to add non-SATERN-based development activities to your plan, you will add **External Activities**. In the next several pages you will learn how to add such external activities to your plan.

Go back to the goal you have just created. Notice the ► symbol next to the **Goal Name**.

- Clicking this button will open up the activities section for this goal.

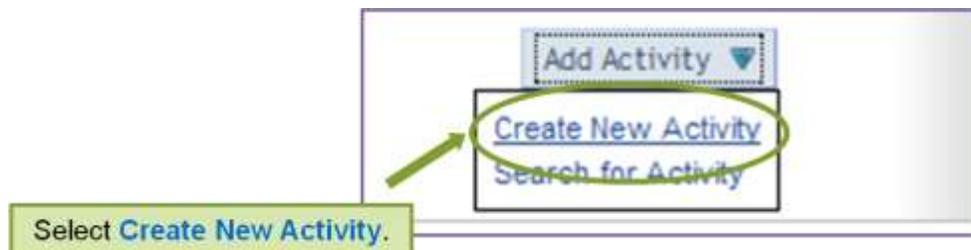


The activity menu will drop down below the goal, allowing you to add an activity.



You are now able to **Create New Activity** or **Search for Activity**:

- **Create a New Activity** will allow you to create a development activity that is not in the SATERN catalog.



In order to finish adding this activity, you need to enter the development activity details.

For an external activity, there are two required fields:

- **Activity Name** should describe the activity in enough detail for a reviewer to understand
- **Target Date** is the date by which you want to achieve the activity

The screenshot shows a form titled "Add Activity - Develop people management skills". It includes several fields: "Activity Type" (External Activities), "Activity Name" (Leadership Development Assignment), "Target Date" (9/30/2013), "Priority", "Target Value", and "Stretch Value". Two callout boxes provide instructions: one points to the "Activity Name" and "Target Date" fields, and another points to the "Target Date" field.

Enter the required activity information, along with any other information you would like.

Target Date will default to the plan expiration date, but you can change it to any date by which you want to achieve the goal. This date does not need to match the expiration date you entered for the plan.

You are also able to add a **Priority** for this activity:

The screenshot shows a dropdown menu for the "Priority" field. The menu is open, showing three options: "1 - HIGH (Directly related to current assignments)", "2 - MEDIUM (For mission objectives/job requirements)", and "3 - LOW (Improve skill set/may not be current job)". A callout box points to the dropdown menu.

Enter a **Priority level for this activity (optional).**

1. **High** – Development necessary and directly linked to job assignments, job-specific skill sets, and will likely lead to improved job performance and ability to accomplish mission objectives.
2. **Medium** – Necessary to accomplish organization strategic goals and objectives, not directly needed to perform job responsibilities, but would improve and enhance job performance.
3. **Low** – The development activity supports goals not directly related to your current job description, but will appreciably improve your skill set.

The **Target Value** is the number for a value-based activity

- Example: for 480 hours of an external activity, the target value = 480
- Leave this field blank if the activity is not measured numerically

The screenshot shows a form titled "Add Activity - Develop people management skills" with a "Close" button in the top right. The form contains the following fields and values:

- Activity Type:** External Activities (Activities Not in the Catalog such as Academic Courses, Conferences, and Seminars)
- Activity Name:** Leadership Development Assignment
- Target Date:** 9/30/2013 (with a "Pick" button)
- Priority:** 3 - LCW (Improve skill set/may not be current job)
- Target Value:** 480 (with "(1000)" below it)
- Stretch Value:** 520 (with "(1000)" below it)

Callouts and annotations:

- A green box at the bottom left says "Click **Add** when finished." with an arrow pointing to the "Add" button.
- A green box at the top right says "Enter a **Target Value** for a numerical measure of completion (*optional*)."
- A green box at the bottom right says "You can set a **Stretch Value** for a numerical measure above the **Target Value** for exceptional performance."
- Green arrows point from the "Target Value" and "Stretch Value" fields to their respective callouts.
- The "Add" and "Cancel" buttons at the bottom are circled in green.

You have now completed the addition of an external activity.

The screenshot shows the IDP tool interface. At the top, a goal is listed: "Develop people management skills" with a target date of "9/30/2013". Below this, the "Details" section shows "Activities (1)".

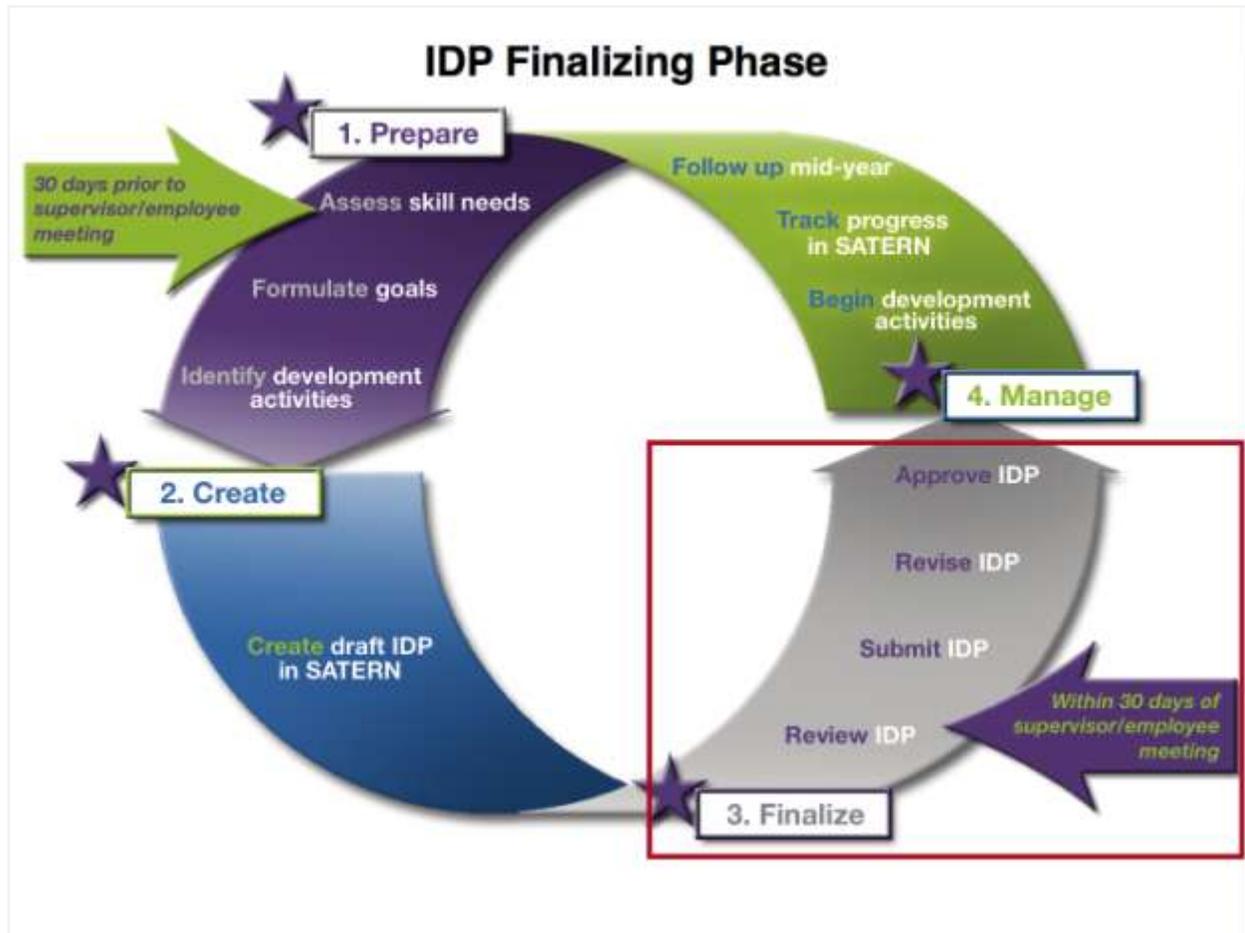
Name	Due Date	Type	Priority	Status	Target/Stretch	Remove
Leadership Development Assignment	9/30/2013	External Activities (Activities Not in the Catalog such as Academic Courses, Conferences, and Seminars)		Not Started / 0.00% Current	480 / 520	View/Add Notes, Edit, Update Activity Status, Remove

Note: Remember that external activities require submission of an SF-182 External Training Request.

Let's quickly review:

- You selected **Create New Activity** to create a non-SATERN-based development activity
- You entered the *required* development activity details required by the IDP tool:
 - **Activity Name**
 - **Target Date**
- You assigned the *optional* fields:
 - **Priority**
 - **Target Value**

5 PHASE 3: Finalize Your IDP



What is included in this Phase?

This phase includes all of the steps involved in finalizing your IDP.

It includes information on:

- Viewing Your IDP
- Printing Your IDP
- Checking Notes From Your Coach or Mentor (Optional)
- Verification With Your Supervisor
- Making Edits to Your IDP
- Submitting Your IDP
- If Your IDP is Rejected

5.1 View Your IDP

You have options to customize the display of your IDP.

To view your IDP online, navigate to the **Career** tab then **IDP**. Your IDP will display:

My IDPs and Goals

The details of this IDP are shown below. You may add or edit goals to the IDPs. You may add or edit supporting activities for those goals. You must submit the IDP for approval. Once your IDP is approved by your superior, you will be allowed to update the status of goals and activities. You may view or add notes to this IDP at any time. To select another IDP, hover your mouse over the image by the side of the current IDP title and select a different IDP. If you have been designated as a Coach, you may view, update, or add other users' IDPs.

* - Required Fields

IDP Title: Systems Engineering (Select Other IDP) IDP Period: Performance Year 2009 (1 year) Select | Clear
 IDP Status: Draft IDP Purpose: To support a career shift to systems
 Effective Date: 5/1/2009 Expiration Date: 4/30/2010

Print IDP | List all IDPs | View/Add Notes | Save | Submit for Approval

Development Personal

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	Remove
Develop people management skills	9/30/2012	Improve skill set(may not be current job)		View/Add Notes Move Goal Edit

Details

Activities (1)

Name	Due Date	Type	Priority	Target/Status	Remove
Leadership Development Assignment	9/30/2012	External Activities (Activities Not in the Catalog such as OJT, Academic Courses, Conferences, Seminars)	For mission objectives(job requirements)	483 / 600	View/Add Notes Edit

On the My IDPs and Goals page, you will see options for Group By and Field Chooser:

Development Personal

Title: Add Description

Group By: Section Field Chooser New Goal

- The Group By drop-down menu allows you to view your IDP by Section, Category, or Priority.

Group By: Section

- Section
- None
- Category
- Priority

Section MID-RANGE GOALS: 2 - 4 YEARS(3)

Goal Name

- The Field Chooser button allows you to select the fields to display on the IDP screen and their order.

Field Chooser					
1	Goal Name	<input type="checkbox"/>	Goal Status	<input type="checkbox"/>	Related Competency
2	Changes	<input type="checkbox"/>	Description	<input type="checkbox"/>	Goal Weight
3	Target Date	<input type="checkbox"/>	Aligned Initiatives	<input type="checkbox"/>	Goal Category
4	Priority	<input type="checkbox"/>	Goal Number	<input type="checkbox"/>	Section
5	Percent Toward Target	<input type="checkbox"/>	Supporting		

5.2 Print Your IDP

If you want to review your IDP with a paper copy or an electronic file (e.g., Adobe PDF), you can print your draft IDP in SATERN.

- The printout of your draft IDP will include all notes and comments added to your plan.

To print your draft IDP, click on the **Print IDP** button on the **My IDPs and Goals** page.

My IDPs and Goals

The details of this IDP are shown below. You may add or edit goals to the IDPs. You may add or edit supporting activities for those goals. You must submit the IDP for approval. Once your IDP is approved by your supervisor, you will be allowed to update the status of goals and activities. You may view or add notes to this IDP at any time. To select another IDP, hover your mouse over the image by the side of the current IDP title and select a different IDP. If you have been designated as a Coach, you may view, update, or add other users' IDPs.

* = Required Fields

IDP Title : Systems Engineering (Select Other IDP)
IDP Period : Performance Year 2009 (1 year) Select | Clear
▲ This IDP contains changes that have not been approved.

IDP Title : Systems Engineering
IDP Purpose : To support a career shift to systems

IDP Status : Draft
Version : 0 (current)

Effective Date : 5/1/2009
Expiration Date : 4/30/2010

Click **Print IDP**.

Your draft plan report will look something like this:

The screenshot displays the following information:

- Learnings:** User Name: *****; Learner Name: MYERS, JENNIFER F
- My IDP:** IDP Title: Systems Engineering; IDP Status: Active/Approved; Effective Date: 1/1/2010 12:00 AM EST; IDP Period: CY 2010; Version: Current; Expiration Date: 12/31/2010 12:00 AM EST
- IDP Notes:** Created By: Supervisor, HUBBARD, ROBERT - 1/15/2010 12:12 PM EST; Notes: Add in additional goals.
- IDP Areas:** IDP Area: Development; Title: ; Description: ;
- Group By:** Details: Section: MID-RANGE GOALS: 2 - 4 YEARS

Print or create an electronic file as you would any other document from your browser.

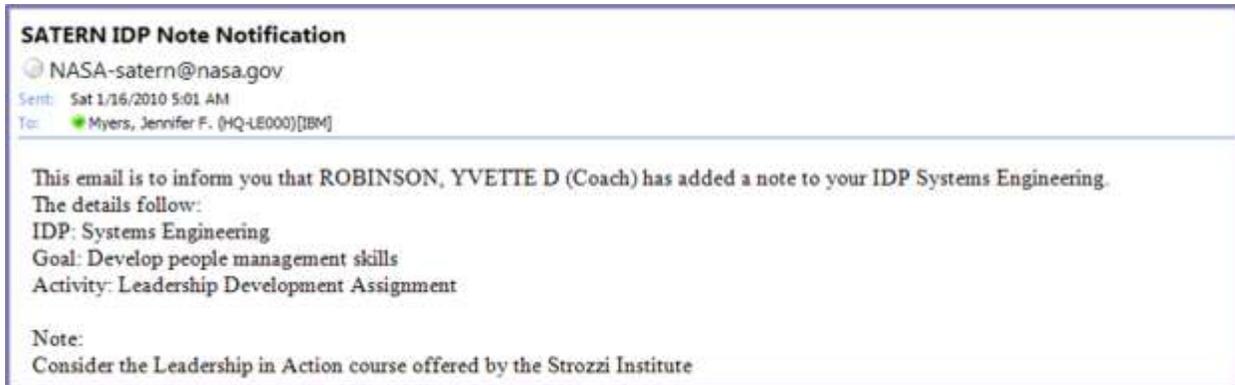
Note: Your IDP always prints in a standard format, regardless of your display customizations.

5.3 Check Notes From Your Coach or Mentor (Optional)

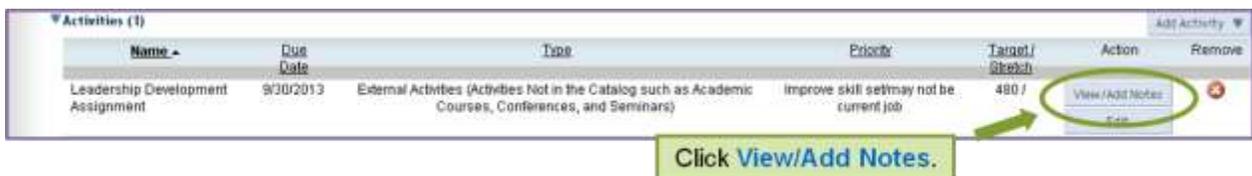
If you selected a coach or mentor for your plan, he or she will be able to view your IDP in SATERN at any point.

- You should discuss and agree on the following with your coach or mentor:
- **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
- **Timeline** – When is the feedback expected?
 - The date that the draft IDP will be ready for review
 - The target date for mentor comments
- SATERN does not provide email notifications or alerts to your coach or mentor that your IDP is ready for review.
 - You and your coach or mentor should agree on how you will notify him or her when your draft IDP is ready for review.

- However, you will receive an e-mail notifying you that your coach or mentor has made comments:



- If you print your IDP, all notes made on your IDP will appear on the printout.
- If you choose to view your IDP online, there are several places to check for notes from your coach or mentor in your IDP.
 - There is no indicator to show if a particular section contains notes, so unless you have discussed it with your coach or mentor or receive an e-mail notification, you should check all possible locations.
 - The first place your coach or mentor can enter notes on the overall plan is on the IDP home page, under **View/Add Notes**.



- Each section of your IDP will have an option to **View/Add Notes**. Click on each one to see the notes for that section.

My IDPs and Goals

The details of this IDP are shown below. You may add or edit goals to the IDPs. You may add or edit supporting activities for those goals. You must submit the IDP for approval. Once your IDP is approved by your supervisor, you will be allowed to update the status of goals and activities. You may view or add notes to this IDP at any time. To select another IDP, hover your mouse over the image by the side of the current IDP title and select a different IDP. If you have been designated as a Coach, you may view, update, or add other users' IDPs.

Request Note:

IDP Title: Systems Engineering (view) **IDP Period:** Performance Year 2009 (1 year) **Select | Clear**

IDP Title: Systems Engineering **IDP Purpose:** To support a career shift to systems

IDP Status: Draft **Version:** 3 (current) **View**

Effective Date: 01/2009 **Expiration Date:** INDEFINITE

Buttons: First IDP, List all IDPs, **View/Add Notes**, Save, Submit for approval

Warning: This IDP contains changes that have not been approved.

Click View/Add Notes.

Goal Name	Target Date	Status	Percent Toward Target	View/Add Notes
Develop people management skills	9/30/2012	Improve skill set/may not be current job		View/Add Notes

Activity Name	Due Date	Title	Priority	Target/Status	View/Add Notes
Leadership Development Assignment	9/30/2012	External Activities (Activities Not in the Catalog such as OJT, Academic Courses, Conferences, Seminars)	High	450 / 600	View/Add Notes

- Any comments will be listed under **Review Notes** and will contain your reviewer's name, his or her role, and the date and time the review occurred.
- Anyone adding a comment will see all other comments that have been made.

Add Notes

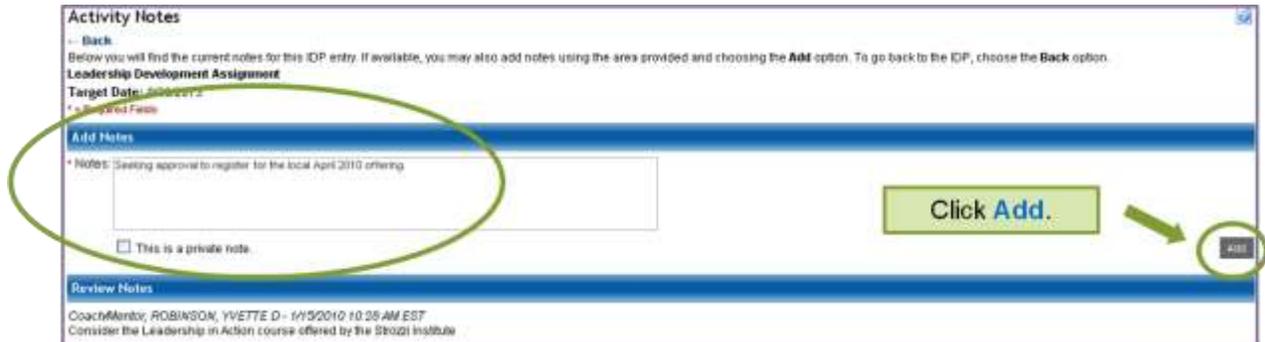
* Notes:

This is a review note **Add**

Review Notes

Coach/Mentor, ROBINSON, YVETTE D - 1/15/2010 10:26 AM EST
Consider the Leadership in Action course offered by the Strazzi Institute

- You can also **Add Notes** of your own.
 - If, for example, you revised your plan based on comments received, you can document the changes you made to your plan and how you addressed your reviewer's concerns before final submission.



*Note: Checking **This is a private note.** will ensure that your coach or mentor and supervisor cannot view your notes, but they are recorded in the system and are not truly “private.”*

- If there are no comments for a particular section, the **Review Notes** section will state that.



Let us quickly review:

- You checked for comments in the **Notes** section of your printed IDP.
- You checked for comments by viewing your IDP and checking the **View/Add Notes** section for each goal and activity.

5.4 Verification With Your Supervisor

Prior to submitting your IDP:

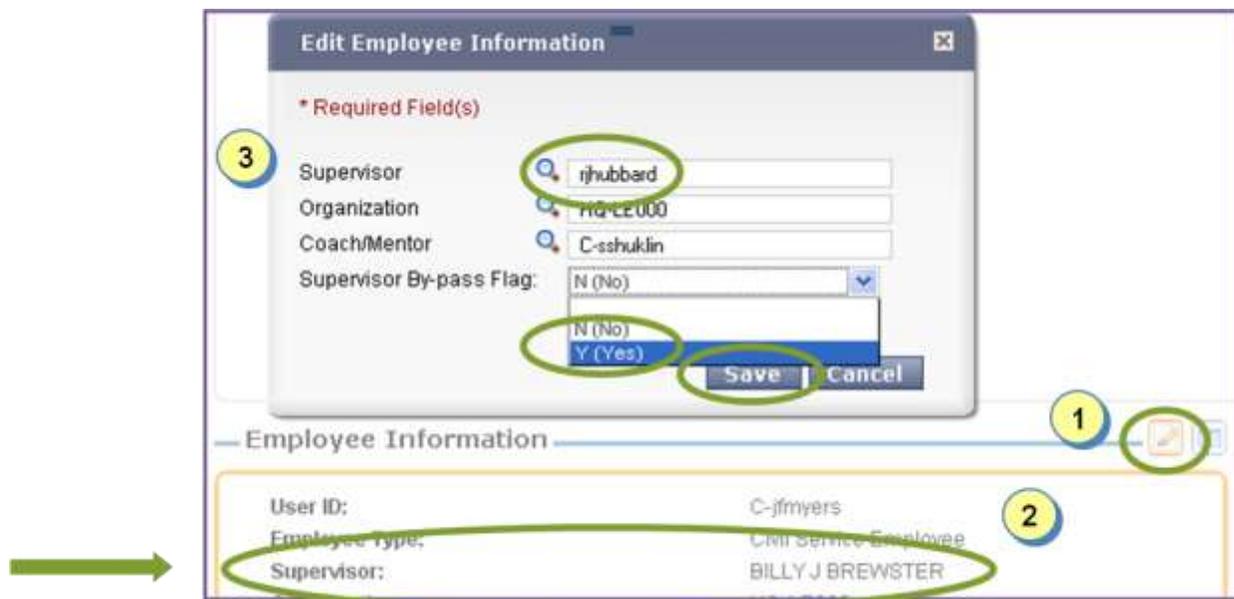
- Contact your supervisor to let him or her know you would like to discuss your draft.
 - This can be a formal or informal meeting. The purpose is to review your draft plan with your supervisor and receive/integrate feedback prior to submission.
 - You may want to print a copy or e-mail an Adobe PDF file of your IDP to review during this meeting.

- Check to ensure that you have the correct Supervisor indicated in SATERN by returning to the **Personal** tab and click on **Profile**:



If the supervisor listed is not correct, change it by:

- Clicking on the pencil icon
- Clicking on the yellow **Employee Information** box to edit
- Browsing to find your supervisor, setting the **Supervisor By-pass Flag** to **Y (Yes)**, and clicking **Save**.

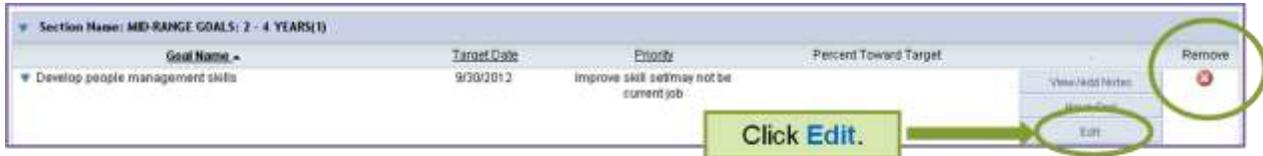


5.5 Make Edits to Your IDP

At this point in the process, you have reviewed comments from your coach or mentor (if applicable), and you have talked with your supervisor about your draft IDP.

You may now wish to make final edits to your IDP before submitting it to your supervisor for approval.

- To make edits to your plan, click **Edit** on the on the View IDP screen.
- To delete a goal or an activity, click on the **Remove** icon in the last column.



Note: If you want to set the Priority of a competency-based goal, you can only do so in the Edit function.

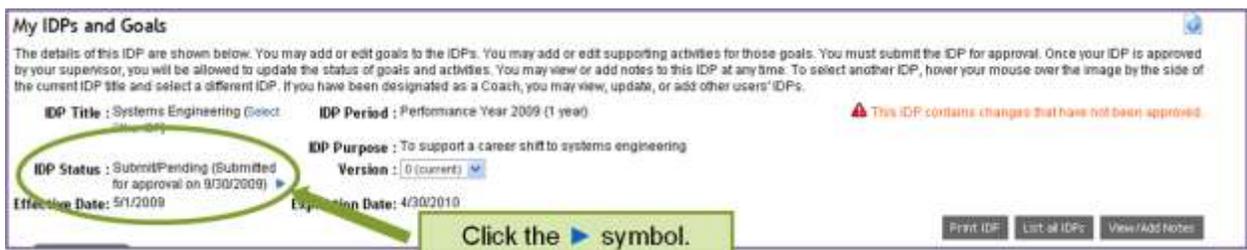
5.6 Submit Your IDP

Once you have discussed your plan with your supervisor and integrated any comments, you are ready to submit your IDP for approval.



Note: You need to have at least one activity for each goal to submit your IDP for approval.

Your screen will now show that your **IDP Status** is now **Submit/Pending**.



- If you click on the ► symbol next to the **Submit/Pending** status, you can view who currently has your draft IDP:

IDP Status : Submit/Pending (Submitted for approval on 1/14/2010) **Version :** 0 (current) ▼

Effective Date: 5/1/10

Step No.	Action?	Name	Approved Date
1	Submitted	MYERS, JENNIFER F	1/14/2010
2		HUBBARD, ROBERT J	

Development 010

Title:

Your supervisor will be notified by email that there is an IDP awaiting approval:

From: <NASA-satern@nasa.gov>
Date: Fri, 15 Jan 2010 11:27:00 -0600
To: "Hubbard, Robert J. (KSC-BAE00)" <robert.j.hubbard@nasa.gov>
Subject: SATERN IDP Review

MYERS, JENNIFER F has submitted a new Plan. This new plan (Systems Engineering) is for MYERS, JENNIFER F and requires your Review and Approval. Please log in to SATERN and review this IDP as soon as possible. Contact your supervisor if you have any questions.

Once your IDP has been approved, three things will happen:

1. You will receive an email notifying you that your IDP has been approved and is active:

Inactive SATERN IDP Approved

NASA-satern@nasa.gov

Sent: Tue 1/26/2010 4:41 PM
To: Myers, Jennifer F. (HQ-LE000)[IBM]

This email is to inform you that your IDP Systems Engineering was reviewed and approved by HUBBARD, ROBERT J on 1/26/2010 04:40 PM EST. Your IDP will be effective from 4/30/2010 12:00 AM EST.

- Your SATERN home page will automatically update your Learning Plan with any SATERN catalog items included in your IDP.

The screenshot shows the SATERN home page with a navigation menu at the top: Personal, Learning, Career, Catalog, and Reports. The Learning menu is expanded, showing options like Learning Plan, Surveys, Learning Calendar, Current Registrations, Curriculum Status, Learning History, Record Learning, and External Training Requests. The main content area includes a welcome message for JENNIFER MYERS, an Alerts section (no alerts), a Catalog section, and an IDPs table. A Learning Plan section is highlighted with a green oval, showing a table with columns for Title, Type, and Required By. The table lists 'REQUIREMENTS MANAGEMENT IN CRADLE' and 'COMMUNICATION AND COORDINATION'.

Goal Name	Type	Target Date	Percent Toward Target
Human Capital Management	Development	12/31/2012	0.00%
Systems Engineering	Development	9/30/2010	0.00%

- Your IDP Plan Status will be updated.

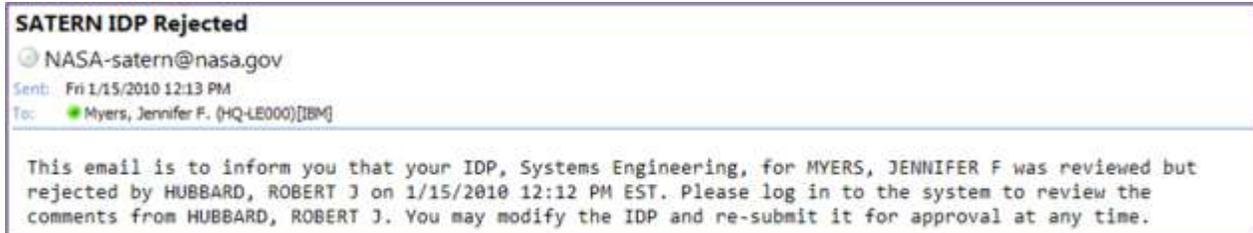
The screenshot shows the 'My IDPs and Goals' page. The IDP Title is 'Systems Engineering (Select Other IDP)'. The IDP Period is 'Calendar Year 2010'. The IDP Purpose is 'To support a shift to systems engineering'. The IDP Status is 'Active/Approved (Expires 350 days from now)'. The IDP Version is '1 (current)'. The Expiration Date is '12/31/2010'. The IDP Status is highlighted with a green oval.

Note: You can only have one active and approved IDP at a time. Therefore, if you have two active IDPs and the periods overlap, the later one will supersede the previous IDP when it is approved.

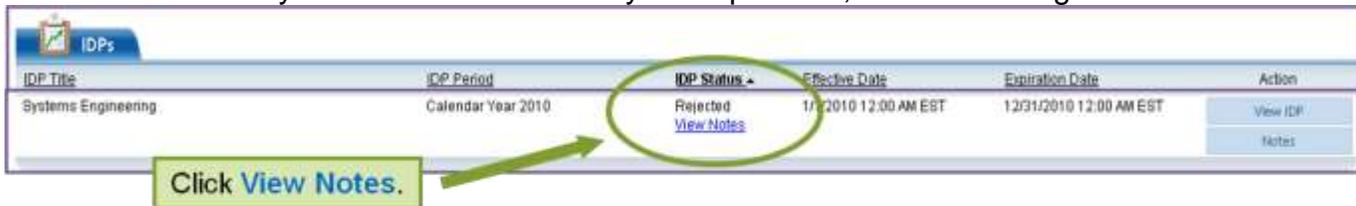
5.7 If Your IDP is Rejected

If your IDP is rejected, three things will happen:

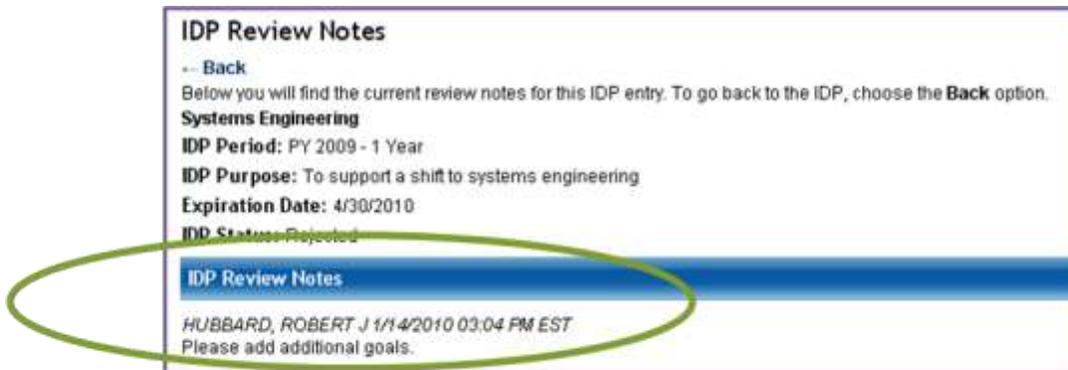
1. You will receive an email notifying you that your IDP has been rejected:



2. Your **IDP Status** will be listed as **Rejected** and a link will be provided that will direct you to **View Notes** from your supervisor, which should guide further edits.



- When you click **View Notes**, your supervisor's comments will display:



3. Once you have considered your supervisor's comments, you can add new goals or activities or click **Edit** to make any changes to your existing goals and activities before resubmitting your IDP for approval.

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

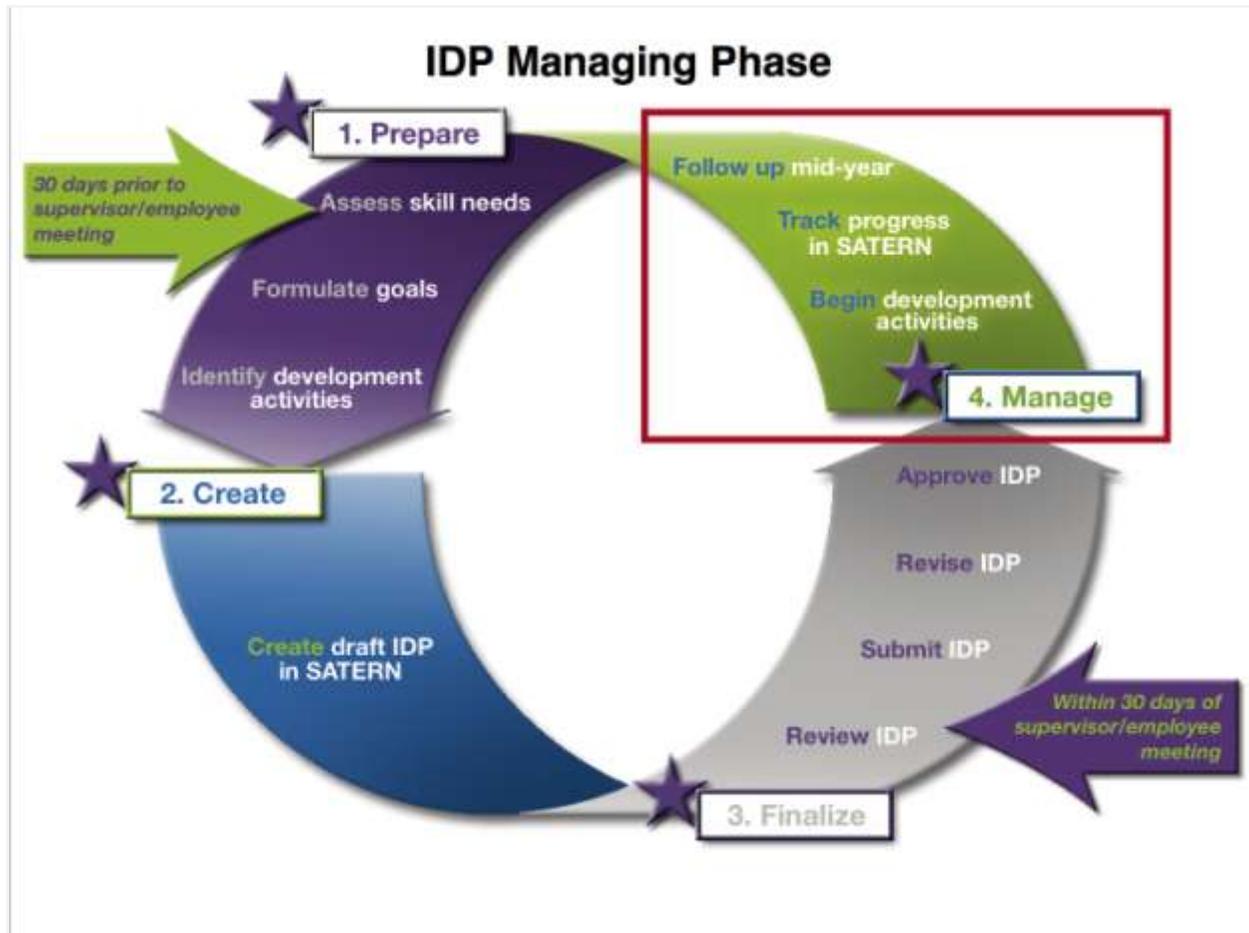
Click [Edit](#).

5.8 Summary

Before submitting your IDP, remember to:

- Check notes from your coach or mentor (if applicable)
- Discuss your draft with your supervisor
 - You may want to print or e-mail your draft IDP for your discussion
- Make any necessary edits and notes you would like to add
- Verify your supervisor in SATERN and make a change if needed

6 PHASE 4: Managing Your IDP



What is included in this Phase?

This phase includes all of the steps involved in managing your IDP.

It includes information on:

- Starting Work on Activities
- Tracking Your Progress
- Following Up with Your Supervisor
- Revising Your IDP
- Preparing for Next Year
- Copying Your Goals into a New IDP

6.1 Start Work on Activities

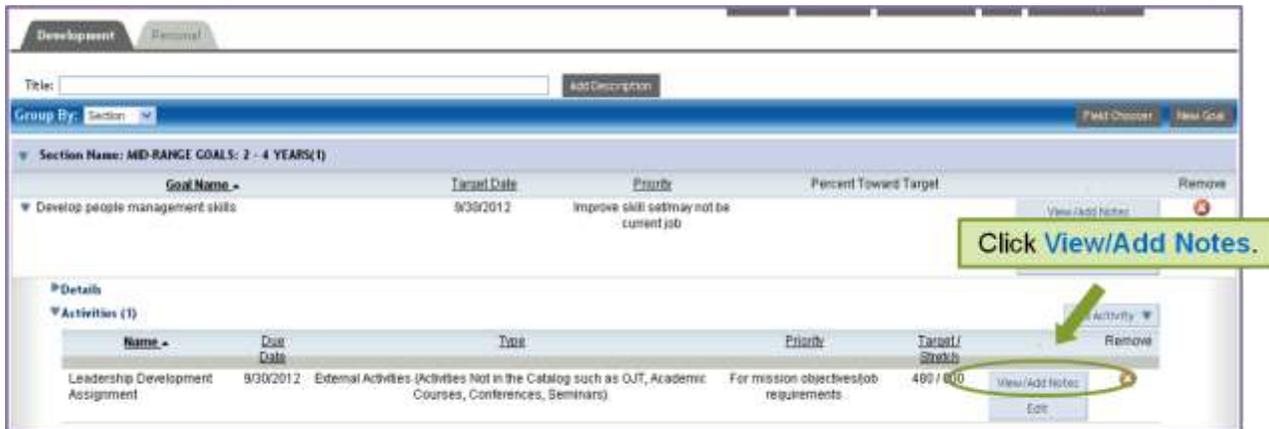
Once you have submitted an IDP and it has been approved/activated, you will be able to:

- View or add notes to any of your activities
- View item details for SATERN offerings
- Request a schedule for instructor-led SATERN offerings

- Register for scheduled SATERN offerings
- Launch SATERN online content
- Track your progress on any of your activities

For any activity in your IDP, you will be able to view and add notes about the activity.

- In the **View/Add Notes** section, you can add details about the activity (e.g., program dates, contact information).



To view detailed information about any SATERN offering, click **View Item Details**.

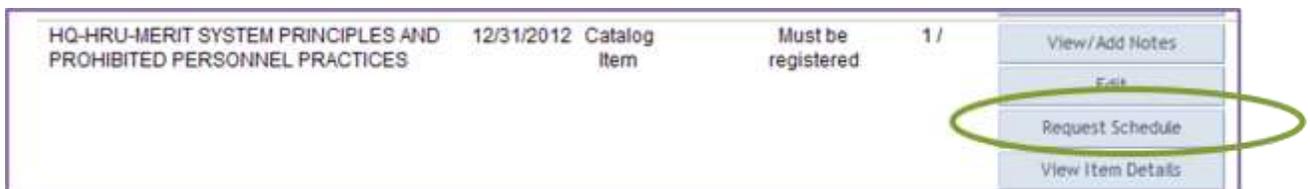
- If you are ready to begin an online offering, click **Launch content**.



If the item is instructor led, then one of two buttons will display.

You can:

- **Request Schedule** for an unscheduled offering



- **Register** for a scheduled offering
 1. Click on **Offering Details**

Name	Due Date	Type	Priority	Status	Target / Stretch	Action	Remove
APPEL- FUNDAMENTALS OF SYSTEMS ENGINEERING	9/3/2010	Catalog Item		Must be registered		View/Add Notes Edit Offering Details View Item Details	

2. Under **Available Scheduled Offerings**, click on **Register**

Available Scheduled Offerings							
Days	Start	End	Location	Available Seats	Price	Action	
5	4/12/2010 08:00 AM PST	4/16/2010 05:00 PM PST	NASA AMES CONFERENCE CENTER (ARC) - ARC-NADC (BLDG. 3), BALLROOM	38	0.00 (USD)	View Details	Register
5	4/16/2010 08:00 AM EST	4/23/2010 05:00 PM EST	OSPC-Bldg 1 - OSFC-Bldg 1-1-Room E1100	38	0.00 (USD)	View Details	Register

6.2 Track Your Progress in the IDP

To track your progress, go to the **My IDPs and Goals** screen.

- You will see that your **IDP Status** is **Active/Approved**.

My IDPs and Goals

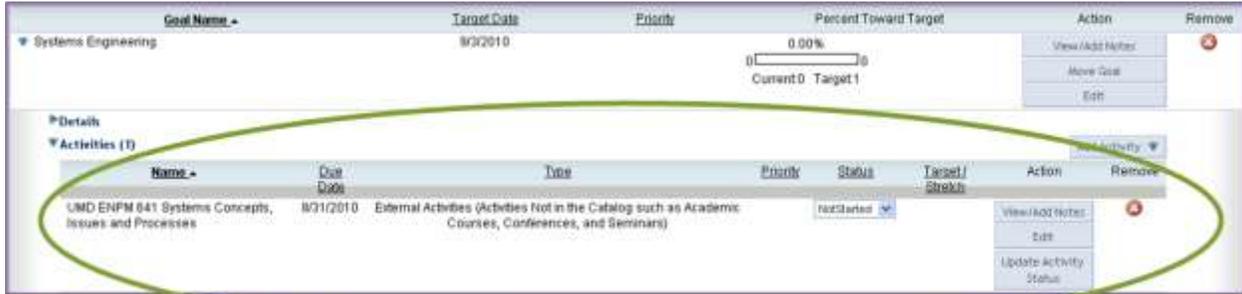
The details of this plan are shown below. You may update the Status of Goals and Activities. Additionally, you may add or edit Goals to Goals. However, if you have made changes since the Plan was last approved, you must submit the Plan for Approval again. Only approved. You may view or add notes to this Plan at any time. To select another plan, hover your mouse over the image by the side of the current plan. As a Coach, you may view / update or add other User's Plans.

IDP Title : Systems Engineering (Select Other IDP)
IDP Period : Calendar Year 2010
IDP Status : Active/Approved (Expires 323 days from now)
IDP Purpose : To support a shift to systems engineering
Version : 1 (current)
Effective Date: 11/1/2010
Expiration Date: 12/31/2010

When you update your progress, your plan will automatically calculate your progress toward your goals.

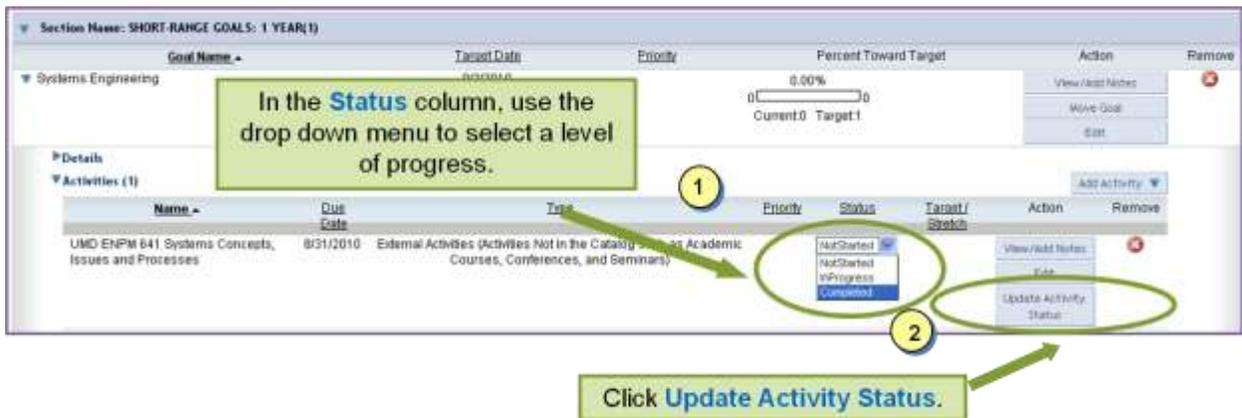
The two screen shots will show you how to track progress on your activities on **External Activities** for a **Competency-Based Goal** with *no Target Value*.

- This means that the activity is not numerically measured.



The **Status** column allows you to select the level of progress you've made toward completing your activity. You can choose from three options: **Not Started**, **In Progress**, or **Completed**.

- Be sure to save your recorded status by clicking on **Update Activity Status**.



The next screen shot shows you how to update progress on an **External Activity** with a **Target Value**.

- In this example, the activity is a development rotation that will last for 480 hours (12 weeks), and of which 40 hours have been completed.



*Note: **Target Value** must be less than the **Stretch Value**.*

This example uses hours as a measurement but you could also use days, weeks, or months.

The screenshot shows a table with the following columns: Name, Due Date, Type, Priority, Status, Target/Stretch, Action, and Remove. The first row contains the following data: Name: Leadership Development Assignment; Due Date: 9/30/2013; Type: External Activities (Activities Not in the Catalog such as Academic Courses, Conferences, and Seminars); Priority: Improve skill set/may not be current job; Status: InProgress / 8.00%; Target/Stretch: 480 / 520; Action: View/Add Notes, Edit, Update Activity Status; Remove: [Red X icon].

Annotations on the screenshot:

- 1. A callout box points to the 'Current' input field in the Status column, containing the number '148'. The text reads: "Enter the number of hours you have completed in the **Current** column."
- 2. A callout box points to the 'Update Activity Status' button in the Action column. The text reads: "Click **Update Activity Status**."
- 3. A callout box points to the 'Status' column. The text reads: "In Progress updates automatically to reflect the percentage of the target value that has been completed."

There are two types of activities that you do *not* need to update manually:

1. **Catalog Items** in SATERN will automatically record completion.
2. **External Activities** requiring a **SF-182**: if you complete a SF-182 to enroll or register for a development activity, the NSSC will record completion of your activity.

When you complete a catalog item or an activity that requires a SF-182, the activity will automatically be listed in your Learning History.

6.3 Follow Up with Your Supervisor

It's a good idea to meet with your supervisor about half-way through the year. Your mid-year performance review is an opportunity to do so.

These meetings provide an opportunity to discuss:

- Your progress on your development activities
- Your satisfaction with the activities
- Any mid-year adjustments to your IDP

6.4 Revise Your IDP

If mid-course adjustments or changes are necessary, you can revise your approved IDP by:

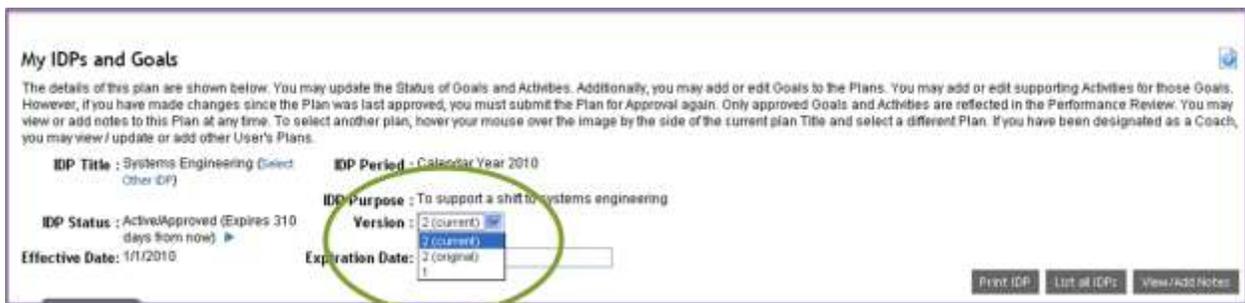
- Going to the **Career** tab and selecting **IDP**
- Selecting the IDP you wish to revise
- Clicking **Edit** next to the goal and/or activity



When you revise your IDP, the IDP will receive a new version number.

- All previous versions will remain, and you can view them by choosing the desired version in the **Version** drop down.

Also, when you revise your IDP, whether adding or removing goals or activities, you will be required to re-submit your IDP for approval.



6.5 Prepare for Next Year

It is never too early to start thinking about the next year.

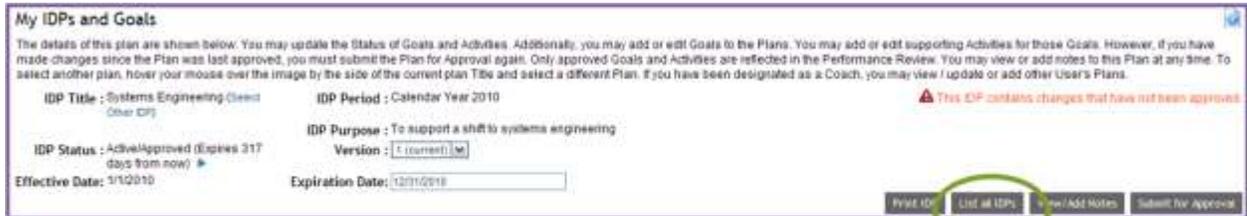
Prepare for further development by:

- Thinking about new goals that build upon the ones you have already set and achieved
- Being on the lookout for new learning opportunities
- Discussing your ideas with a coach or mentor
- Creating a draft IDP for the upcoming year

6.6 Copy Your Current Goals into a New IDP

If you would like to build on your current goals in the coming year, you can copy your goals into a new IDP

- Go to the **My IDP and Goals** page and click **List all IDPs**.

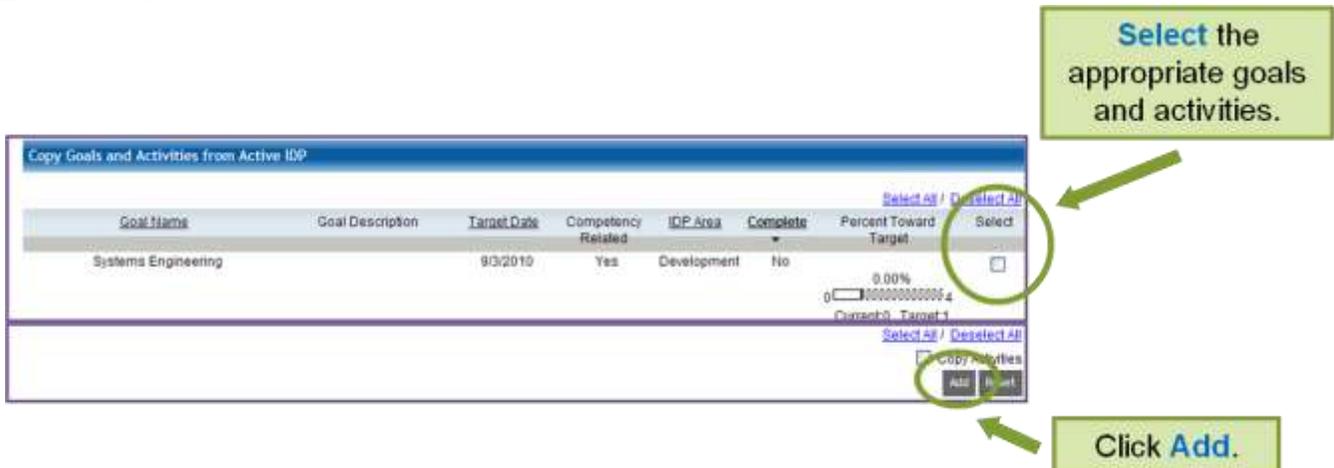


Once on the IDPs screen, click **Create New IDP** button to create a new IDP.



You will enter your plan information as usual, but you will select the option to **Copy Goals and Activities from Active IDP**.

- Select** the goals you would like to copy by checking the appropriate boxes in the last column.
- Click **Add** button.



7 Summary

The Individual Development Planning functionality in NASA's SATERN learning management system provides a real-time tool to help you manage your development goals and activities. As priorities and needs change, you should revisit your IDP; if you do not accomplish everything, it may indicate a change in priorities. Communication between you and your supervisor is a beneficial aspect of creating an IDP.

The IDP tool in SATERN is available 24/7 and is accessible via the Web.

Support for the IDP in SATERN is available via the NSSC Contact Center and through your Center Training Office.

Job aids and FAQs can be accessed at <https://saterninfo.nasa.gov>.

8 Frequent Asked Questions (FAQs)

1. Who is responsible for completing the IDP?

Both the supervisor and the employee are responsible for developing the IDP. While the employee completes the IDP with the cooperation and assistance of the supervisor, it is the supervisor who approves the IDP.

2. Is it mandatory to have an IDP?

The Agency supports employee growth and development and strongly recommends the use of Individual Development Plans (IDPs) to capture all career development activities. The IDP form in SATERN is recognized as the official development planning document within the Agency. While there is no Agency requirement for every employee to have an IDP, if a Center has a requirement for an IDP, employees must use the IDP form in SATERN. It should be noted that IDPs will be required for employees who participate in formal Agency development programs (e.g. SESCDP, NASA FIRST, MLLP).

3. Who can create an IDP in SATERN?

Any NASA civil service employee can create an IDP in SATERN. The IDP is not available for use by contractors.

4. Why should I create an IDP?

Individual development planning offers you the formal opportunity to collaborate with your supervisor in designing a strategy for career growth. The IDP allows you to document short-range, mid-range, and long-range career goals, as well as the training and development activities required to reach each goal. This electronic document can then be updated as you complete these activities, providing a comprehensive view of skills and competencies over time.

5. What if I didn't receive the training and development on my last IDP?

IDPs are used by civil service employees as a systematic means of planning individual training and development to meet short-, mid-, and long-range goals. An IDP does not guarantee training, development opportunities or advancement. It is an opportunity to address individual and Agency goals, and to prepare the individual for future opportunities.

6. When should I create an IDP?

While it will not be a factor in your performance summary rating, the IDP process will coincide with the performance appraisal period (May 1st – April 30th). You and your supervisor will meet within this timeframe to discuss goal-setting and development activities that will help build skills.

7. What happens to my IDP after it is approved?

Within your office, your supervisor can use IDPs to coordinate training and development opportunities. Consult your supervisor or Training Officer for more information.

8. What if I'm a supervisor?

As a supervisor, you have an important role in the IDP process and are encouraged to meet with your employees to discuss developmental goals early in the year. You are the only person who can approve and activate an employee's IDP in SATERN.

9. What if I'm a coach or mentor?

An employee has the option of routing his/her IDP to a coach or mentor for review. As a coach or mentor, you can offer comments on the IDP but cannot approve or activate the IDP in SATERN.

10. Can I have multiple IDPs?

Only one IDP can be active in SATERN at a time. Employees who need to have program goals as well as goals that relate to their current job function (e.g., those employees who are participating in formal Agency development programs like SESCO, NASA FIRST or MLLP) can create separate goals and development activities for each purpose and name them accordingly.

11. Can I change my coach or mentor in my IDP?

Yes, you can change your coach but you can only have one coach or mentor. You can also add a coach or mentor at a later time if you do not select one when you initially create your IDP.

12. Can I select a coach or mentor who is not at my Center?

Yes, your coach or mentor can be any civil servant employee.

13. Can the target dates for a goal or activity exceed the IDP expiration dates?

Yes, you can choose any target dates. For example, for mid-range and long-range goals, it would not be unusual for target dates to extend beyond a one-year period.

14. Where can I get more information?

For more information on using the IDP in SATERN, contact your Center's Training Office or go to <https://saterninfo.nasa.gov>.

