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United States Coast Guard

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COMDTINST 5357.1A
FEB 2, 2006

COMMANDANT INSTRUCTION 5357.1A

Subj: COAST GUARD INDIVIDUAL DEVELOPMENT PLAN (IDP)

Ref: (a) Mandatory Use of the Training Management Tool (TMT), COMDTINST 5270.2 (series)

1. PURPOSE. This Instruction provides goals and responsibilities for effectively employing the Individual Development Plan (IDP). It establishes that IDPs are *mandatory for first-term enlisted members and junior officers, both active duty and reservists, assigned to a permanent duty station*, and are optional, but highly encouraged, for other military, civilians and Auxiliarists. The Coast Guard designed this program and the IDP forms to: aid in the effective integration of new personnel into our Service; enhance job skills; reinforce expectations of the chain of command; and promote focused communications on career and personal development to support every individual in reaching their full potential.

2. ACTION. Area and district commanders, commanders of maintenance and logistics commands, commanding officers of Headquarters units, assistant commandants for directorates, Judge Advocate General, special staff offices at Headquarters, commanding officers, officers in charge (OIC), and every chiefs' mess shall ensure the contents of this Instruction are given widest distribution and shall ensure compliance with the provisions of this Instruction. Internet release authorized.

3. DIRECTIVES AFFECTED. Coast Guard Individual Development Plan (IDP), COMDTINST 5357.1 is cancelled. This Instruction supersedes ALCOAST 228/04 by making IDPs mandatory for all first-term military members.

4. DISCUSSION. The Coast Guard is fully committed to the personal and professional growth of all of our people, whether civilian, military or volunteer. Since learning and development occur primarily at the permanent unit, commanding officers (this term is used broadly to encompass unit commanders, officers-in-charge, and flotilla commanders) are ultimately accountable for providing their workforce with developmental activities, identifying areas for improvement, and ensuring timely

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	a	b	c	d	e	f	g	h	i	j	k	l	m	n	o	p	q	r	s	t	u	v	w	x	y	z
A	1	1	1	1	1	1	1	1	1	1		1	1	1	1	1	1		1		1					
B	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1
C	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1		1	1	1	1	1	1	1	1
D	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1			1
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coaching. The IDP helps commanding officers meet these responsibilities by emphasizing discussions and joint decisions by personnel and their supervisors. The IDP actively encourages the individual to think about their current position and future potential, and prompts activities to build the expertise, confidence and self-esteem to lead to a successful, fulfilling career.

5. DEFINITIONS.

a. Individual Development Plan (IDP): The IDP is a personally tailored action plan that the supervisor and individual use to identify short and long-term personal and career goals. It outlines the training and developmental experiences to achieve those goals, for the benefit of the individual, unit and Coast Guard, within a specified time frame. It may chart job-specific skills, but also includes more general competencies aimed at supporting the individual's aspirations in terms of education, promotion or advancement, professional accreditation and improved career opportunities. An IDP is not a performance evaluation method, a contract for training, or a means for clarifying or revising a position description.

b. First-termers: Use of an IDP is mandatory for first-term military members. For enlisted members, including prior service accessions and those recruited through the Direct Petty Officer Program, *first-term* is defined as the first four years of Coast Guard service. For officers in the ranks of ensign through lieutenant, including those with prior enlisted service, *first-term* is defined as the first four years of commissioned Coast Guard service.

6. PROCEDURES.

a. Directions specific to each component of the workforce are contained in the enlisted IDP guide and form, Enclosures (1) and (2), and the civilian/officer/Auxiliarist IDP guide and form, Enclosures (3) and (4).

b. The following steps are required for first-termers and recommended for all other civilians, military and Auxiliarists :

(1) Initiate the IDP as part of the individual's check-in at the permanent unit and ensure the supervisor holds the first counseling session within 30 days. The intent of this requirement is to identify and align both the new member's and the Coast Guard's expectations for personal and professional development.

(2) Counsel first-term personnel on their IDP a minimum of twice a year. To ensure clear distinction from the evaluation process, supervisors should conduct IDP counseling separately, such as at the mid point between mandatory performance review sessions.

(3) Document IDP counseling in the Training Management Tool (TMT), reference (a), (except for Auxiliarists). Once entered into TMT, the IDP counseling remains valid (current) for

180 days; after 180 days, TMT will indicate that the task is overdue until the next required IDP counseling session is completed and entered into TMT.

7. ROLES AND RESPONSIBILITIES. The command, supervisor, and individual all have important roles in the IDP process.

   a. The commanding officer's responsibilities are as follows:

      (1) Establish an IDP process for first-termers that commences during their unit check-in and continues throughout the initial four-years of service. Encourage all other personnel to use IDPs.

      (2) Track IDP counseling for military personnel and civilian employees in TMT. Monitor participation and program compliance.

      (3) Make every effort to afford time for training and developmental opportunities listed in crewmembers' IDPs. After an individual attends training, follow-up so that new knowledge and/or skills are practiced and intended outcomes are maximized.

      (4) Project developmental requirements and include in resource planning.

      (5) Seek IDP training available from Career Development Advisors (CDA), Transition/Relocation Managers (TRM) and Education Services Officers (ESO).

   b. The term "supervisor" may be interpreted differently by different components of the workforce, so should be clearly identified locally. Some military members may report directly to their rating chain supervisor, while others will have an immediate supervisor between them and their rating chain supervisor. Civilian employees' first line supervisors are stated on their performance plan and evaluation form. Auxiliarists will follow their flotilla procedures, and, in those cases where an Auxiliarist regularly augments a unit, may establish an additional IDP at that site. The supervisor's responsibilities are listed below:

      (1) Become familiar with the IDP process and purpose to effectively guide participants. Implement all IDP policies and procedures for first-termers. Encourage the use of IDPs and share the role of initiating the IDP process with all other direct reports. Provide the support and resources required to follow through with the actions agreed to in the IDP.

      (2) Assess the unit's/organization's mission, short and long term requirements, staffing, and technology and then assess the person's potential to meet those needs.

      (3) Act as a coach and mentor to help individuals reflect on their potential, set goals and explore career options. Review and discuss the person's strengths and areas for

improvement in the current work assignment; identify and prioritize specific activities to address any gaps in competencies. When the individual drafts the IDP, check to ensure it is realistic and achievable. Once the IDP is finalized, be available with timely feedback and pinpoint areas where the individual could take greater responsibility. Be alert for changes in mission or equipment and make adjustments as necessary.

(4) Identify unit resources to support the IDP and include projected formal requirements in the unit's training plan as reasonable. Developmental opportunities can take many forms, so include a mix of training and experiential learning in the IDP. Besides classroom training, IDPs might incorporate shadowing of senior individuals, mentoring, distance learning, self-study, assignment to a project team, cross-training for exposure to new areas, and/or temporary assignments.

c. The individual's responsibilities are as follows:

(1) Be concerned about planning your career and getting maximum benefit from the energy and time you devote to the Coast Guard. Think about what you need to learn for your current position and what you want to do next. Set goals and objectives applicable to your unit and the Coast Guard, as well as to yourself. Research ways of meeting your career aspirations and enhancing your performance.

(2) Draft the IDP with input from your supervisor and mentors. For first-termers, the immediate supervisor will initiate the process and assist in drafting the first IDP, based on your input.

(3) After finalizing the IDP, begin working on the agreed-to activities. Notify your supervisor of progress and any changed circumstances and keep in touch with your mentors. Be willing to take on increased responsibilities to expand your knowledge and build your expertise.

(4) Share with your supervisor the responsibility of meeting every six months to review the IDP.

d. Command Master Chiefs (CMC) should monitor, via TMT, and encourage, use of IDPs at commands within their area of responsibility.

e. CDAs, TRMs, and ESOs understand how to effectively implement the IDP process and can provide unit training as time and funding permit. Seek their assistance.

f. Commandant (CG-133), as program manager for civilian and military professional development, will maintain the IDP guide and form, promote its usage, and make it accessible to personnel through Commandant Instruction, the Unit Leadership Development Program (ULDP) web site, Adobe Forms, CDAs, CG Central, and at http://www.uscg.mil/leadership.

8. FORMS AVAILABILITY. Coast Guard forms CG-6021, Individual Development Plan (IDP) for Coast Guard Civilians/Officers/Auxiliarists, and CG-5357, Enlisted Individual Development Plan (IDP), are available in USCG Electronic Forms on the Standard Workstation or on the Internet: http://www.uscg.mil/ccs/cit/cim/forms1/welcome.htm or Intranet: http://cgweb2.comdt.uscg.mil/cgforms. You may also access them through the Office of Leadership and Professional Development's homepage at http://www.uscg.mil/leadership and Unit Leadership Development Program web site at http://learning.uscg.mil/uldp.

/s/

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Assistant Commandant for Human Resources

Encl: (1) Enlisted Individual Development Plan (IDP) User Guide
(2) Enlisted Individual Development Plan (IDP)
(3) Individual Development Plan (IDP) User Guide for Civilians/Officers/Auxiliarists
(4) Individual Development Plan (IDP) for Coast Guard Civilians/Officers/Auxiliarists

Enlisted Individual Development Plan (IDP) User Guide

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Introduction

The Individual Development Plan is a valuable performance enhancement and career development tool. The following information is designed to acquaint you with the process, purpose, goals, steps, and value of an IDP.

The supervisor and the member are to work together on the IDP. A convenient time for the supervisor to have a counseling session with the member is:

- First-termers: Required within 30 days of reporting to the unit and then every six months.

- All other enlisted personnel: Within 30 days upon entry in a new job and then every six months.

Remember, the IDP is not a performance evaluation tool.

Definition of an IDP

An IDP is a tool to help individuals reach career goals within the context of organizational objectives. It is a developmental "action" plan to move the individual from where they are to where they want to go. It provides the systematic steps to build on strengths and overcome weaknesses as individuals improve job performance and pursue career goals. It is a tool for all personnel regardless of status or performance.

The most common objectives for having an IDP are to:

- Learn new skills to improve current job performance.
- Maximize current performance in support of organizational requirements.
- Increase interest, challenges, and satisfaction in current position.
- Obtain competencies necessary for a promotion or change in specialty.

Enlisted Individual Development Plan (IDP) User Guide

An IDP is…

An IDP is:

- A developmental partnership between the individual and supervisor. IDP preparation involves feedback, clarification, and discussion about developmental needs, goals, and plans. Supervisor-subordinate communication is key to the success of the IDP process.

- A vehicle to address the needs of the individual and the needs of the organization. The best IDPs begin with a plan to maximize current job performance. The activities can assist the individual in meeting both personal and organizational goals for success.

- A tool to identify a member's developmental needs based on a comparison of skills required by a job and present abilities. It identifies specific competencies for which the person requires development. The mutual interests and concerns of the individual and the organization must be considered in the IDP process.

- A tool to facilitate a relationship between a mentor and a mentee.

- A broadly defined developmental plan that includes on-the-job assignments, self-development activities, and formal classroom training.

- An active and ongoing process. An IDP is a living process that encourages individual empowerment and growth. Ideally, IDPs should be reviewed, updated, and changed as needed every six months.

An IDP is not…

An IDP is not:

- A one-time activity.

- A performance appraisal. The IDP should not be used as a means to formally assess the member's performance and should not be used for human resources decisions (e.g., promotions, etc.). It does not replace the performance evaluation form/system to determine advancements, promotion, pay, awards, etc. The purpose is professional

development, not appraisal. *A person's decision not to carry out a developmental activity or achieve a goal should not impact his or her performance evaluation. Correct use of an IDP, however, will likely improve an individual's performance and behaviors.*

- A contract for training. An individual should include all training interests on an IDP. However, training is not necessarily guaranteed because it is on an IDP. Training decisions are made in accordance with Coast Guard policy and budgetary considerations.

- A guarantee of promotion to a higher paygrade. An IDP can help prepare a person to become qualified for a higher paygrade, but does not imply a guarantee of promotion.

- A fix for all supervisor-personnel relations problems. The IDP is only one part of the comprehensive efforts of an organization to enhance job satisfaction and cooperative work relationships.

IDP Assembly

The Enlisted IDP (Enclosure (2)) is designed for placement within a 3-ring binder with 10 tabs or dividers. The assembly is as follows:

IDP Tabs

Binder Cover Sheet:

Tab 1:
- Insert:
  - First Unit Reporting Guide provided by TRACEN Cape May
  - Unit's Check-in/Indoc Sheet(s)

Tab 2:
- IDP Counseling Session Worksheet

Tab 3:
- Background Worksheet

Tab 4:
- Chain of Command Worksheet

- Other Helpful People to Know Worksheet

Tab 5:

- "A" School and Qualification Criteria Worksheet

Tab 6:

- Advancement Checklists

Tab 7:

- Professional Goal-Setting Worksheet
- Personal Goal-Setting Worksheet
- Educational Goal-Setting Worksheet
- Financial Goal-Setting Worksheet

Tab 8:

- Reservist Information Worksheet

Tab 9:

- Resources

Tab 10:

- Insert
  - Qualification Time Lines, Watch Specific Qualifications, Unit Professional Qualifications, Personal Fitness Plan (Form CG-6049), and any other PQS that establishes unit expectations.

Units will find the Coast Guard's standard form application found in CG Forms helpful when filling out IDPs. However, units may choose to use the Microsoft Word/Excel merge application that is available on the ULDP web-site at http://learning.uscg.mil/uldp which is designed to reduce the amount of data entry.

The Process

As the first-termer progresses through the unit check-in and indoctrination interviews, the IDP shall be introduced and discussed by the designated point of contact (i.e. indoctrination CPO, Command Chief, etc.) with the first-termer. As topics are discussed, notes shall be annotated in the member's IDP. *Specify to the first-termer which sections they are to fill out.*

The supervisor is to have their first formal IDP review and counseling session no later than 30 days from the first-termer's arrival. Written documentation of the session is to be made in Tab 2, the Counseling Session Worksheet, and in TMT.

The IDP process is voluntary but highly recommended for all other enlisted personnel. Follow your command's procedures for IDPs. Use this IDP guide and form to begin the process.

Step One: Assess your competencies and seek out resources and support services

Step One: *Assess your competencies.* There are different ways to assess your personality, interests, knowledge, skills, and abilities. For first-termers, much of this will be done with your supervisor. For experienced members, the Coast Guard has support personnel in place to assist with your assessment. These support personnel can provide information on available professional development, educational, and training resources and other related services. They can also direct you to learning activities that may include formal training, a developmental assignment, on the job training, books to read, etc. They can even work with you to link the appropriate developmental activity to the competency and goal.

Conducting a self-assessment

Yourself: To conduct a self-assessment, start by listing your knowledge, skills, and abilities. You can determine what they are by reviewing current and prior job performance and experience, training, education, and developmental activities to identify the knowledge, skills, and abilities you have. This background review provides concrete information regarding current abilities, strengths, and skills. Specifically, review your records in Direct Access, CG Central (My Workspace: Career Management: Enlisted), TMT, and local Training Records; performance evaluations (found in Direct Access); and any information about significant past training and other developmental activities.

ESO services

Education Services Officer (ESO): Full-time ESOs are located at every Integrated Support Command (ISC), Sector, Training Center, and various other units. All units have an individual who serves as a part-time ESO. An ESO can provide information on various educational opportunities. For example, an ESO can assist with college enrollment, counsel you on non-traditional education programs, guide you in completing a Tuition Assistance form, help in locating scholarships or loans, assist in enrolling in college video and audio courses, and administer or arrange for the administration of all DANTES sponsored examinations.

CDA services

Career Development Advisor (CDA): Your CDA can assist you with information on leadership and professional development programs, advise you about education benefits, and counsel you on career options such as advancement, the transition from enlisted to officer status, or joining the Reserve. A CDA can also assist you with a variety of interest inventories including the Strong Interest and Confidence Skills Inventory (occupational, basic interest, personal style, etc.), Career Assessment Inventory (career decisions involving college, etc.), etc., which are all available through DANTES. CDAs can assist you with developing an IDP.

Coast Guard Institute services

The Coast Guard Institute: The Institute can conduct an Educational Assessment, which determines how your academic experience can be transferred to a college degree program.

CG Transition/ Relocation Manager

Transition/Relocation Manager (TRM): TRMs are located at Integrated Support Commands, TRACEN Cape May, and the Headquarters Support Command. TRMs can assist you in identifying your individual attributes, planning an effective and workable career strategy, and providing you feedback on career issues, options, and barriers. TRMs have a variety of career tools and some are certified career coaches. In addition, some TRMs can assist you with the Myers-Briggs Type Indicator, etc.

Step Two: Write down your goals

Step Two: *Write down your goals.* The act of writing goals on paper is one of the most important aspects of an IDP. It encourages you to think about what you want to achieve and list the steps you will need to take to accomplish your goal(s). The Goal Setting section of the IDP (Tab 7) is divided into professional, personal, educational, and financial goals. For each of these goal areas, think about what you want to do in the short-term (3 months to a year) and long-term (1 to 5 plus years). Present what you want to do in the form of goals. A goal is a statement of a desired outcome or accomplishment that is specific, observable, and realistic. For first-termers, the supervisor will assist in defining your professional, personal, educational, and financial goals. Additional assistance is available from those personnel listed in the Other Helpful People to Know Worksheet (Tab 4).

Questions to ask yourself

Ask yourself:

- What do I want to accomplish in the next 3 to 12 months?
- What do I want to accomplish by this time next year?
- What do I want to accomplish by the end of the second year?

- What do I want to accomplish by the end of the _____ year?
- What steps do I need to take to accomplish each goal?
- What barriers or obstacles might prevent me from accomplishing my goals (e.g., time, money, other commitments, etc.)?
- What can I do to overcome these barriers or obstacles?
- What resources are available to help me?

Refer to the Advancement Checklists (Tab 6). Determine what your advancement options are internal to the Coast Guard and what you need to accomplish. Next, write your goals on the worksheets (Tab 7) and list the steps of how you plan to accomplish them. This will enable a CDA, ESO, or supervisor to better understand your individual needs, goals, and objectives.

Step Three: Set up meeting

Step Three: Set up a meeting with your supervisor. A first-termer's supervisor will automatically set up this meeting for the member.

Step Four: The meeting

Step Four: *The Supervisor/Member Meeting*: The objectives of the supervisor and member meeting are for the supervisor to provide feedback to the member and for the supervisor and member to obtain mutual commitment and align expectations on the IDP.

Supervisor's responsibilities

Supervisor's responsibilities: Before meeting with the member, a supervisor should:

- Determine if there are position-related knowledge, skills, and abilities that need to be enhanced to improve performance in the member's present position
- Review the Advancement Checklists (Tab 6) applicable to the member
- Be aware of training resources available
- Be aware of organizational trends and/or planned changes that will require the member to develop new skills or enhance current skills

Member's responsibilities

Member's responsibilities: The member should provide the supervisor with a draft copy of the goal-setting worksheets (Tab 7) prior to the meeting and should also bring a copy to the meeting.

Enlisted Individual Development Plan (IDP) User Guide

Actions to be accomplished	*Actions to be accomplished*: Together the supervisor and member discuss: • Member's goals, interests, and career aspirations • Organization's needs, expectations, and plans • Advancement and/or developmental objectives for member on which both agree, activities that will achieve the objectives, schedule for activities (considering member's responsibilities), check-back points, and possible reasons for revising or updating the IDP.
Step Five: Finalize & sign counseling worksheet	Step Five: After the member/supervisor meeting, the member prepares the final IDP. Both the supervisor and the member sign the Counseling Session Worksheet (Tab 2) indicating support of the plan. The member keeps the original IDP.
Step Six: Implement	Step Six: Implement your plan.
Step Seven: Follow-up	Step Seven: Continuously update your IDP and follow-up with your supervisor.
Step Eight: Next meeting	Step Eight: Schedule the next counseling session approximately six months out.

U. S Department of Homeland Security CG-5357 (10-05)	Binder Cover Sheet

Enlisted Individual Development Plan (IDP)

Rank:	**Name:**	**Employee ID:**
Unit:		**Date:**

PRIVACY ACT STATEMENT, 5 U.S.C. 552(a) Privacy Act: A. AUTHORITY: 5 U.S.C. 301 Departmental Regulations. B. PURPOSE: To collect information to permit effective Individual Development Plan (IDP) counseling. C. ROUTINE USES: The information on this form is to be used by units, supervisors and members in the coaching of members in career development and goal setting. D. DISCLOSURE: Mandatory for all enlisted members within their first four years of enlistment, active duty and reservist, assigned to a permanent duty station. It is voluntary for all other enlisted members.

Tab Two

Enlisted IDP Counseling Session Worksheet

IDP Counseling for: _____

Initial Counseling:

Date Counseled:	Date/Signature of person entering in TMT:
Member signature:	Supervisor signature:
Initial Counseling Remarks:	

Follow-up Counseling:

Date Counseled:	Date/Signature of person entering in TMT:
Member signature:	Supervisor signature:
Counseling Remarks:	

Date Counseled:	Date/Signature of person entering in TMT:
Member signature:	Supervisor signature:
Counseling Remarks:	

(Photocopy as necessary for additional follow-up counseling sessions.)

Enlisted IDP Background Worksheet

Member Information	
Name:	Date of Birth:
Hometown:	Date of Enlistment:
Unit/Department:	End of Enlistment:
Rate/Rank:	Date Reported to Unit:
Family Status:	Special Needs Program Registration:

Educational Background

Supervisor is to discuss with member and document. Check boxes that apply.

Educational Area	V	Notes
GED		
High School Graduate		
Technical Training		
Professional Certificate		
Some College		
Associate's Degree		
BA/BS Degree		
Masters/PhD		

Overview of Options and Eligibility

Supervisor is to briefly discuss each topic area below with the member. Upon completing that topic, check its box. In the "Notes" blocks, capture any areas of concern or interest by the member so you can discuss it in more detail when you cover those topics in the Advancement Checklists section.

Topic Area	V	Notes
Advancement Plan		
Performance Evaluations		
Enlisted Professional Military Education (EPME)		
Advancement Qualification Exam (AQE)		
Servicewide Exam (SWE)		
Striker Program		

Tab Four

Enlisted IDP Chain of Command Worksheet

Unit:	**Date:**

Immediate Supervisor	
Rating Chain Supervisor	
Department Chief	
Division Officer	
Department Head	
Executive Officer (XO/XPO)	
Commanding Officer (CO/OIC)	
Sector Commander	
District Commander	
MLC and/or Area Commander	
Coast Guard Chief of Staff	
Vice Commandant	
Commandant	
Secretary of Homeland Security	
Commander in Chief	

Enlisted IDP "Other Helpful People to Know" Worksheet

Unit:	Date:

	Active Duty	Reserve
Unit Ombudsman		
Career Development Advisor (CDA)		
Education Services Officer (ESO)		
Financial Advisor		
Command Drug and Alcohol Representative (CDAR)		
Legal Assistance		
Employee Assistance Program Coordinator		
Health Promotion Coordinator or Manager		
Transition/Relocation Manager		
CG Mutual Assistance		
Chaplain		
Civil Rights Officer		
Senior Reserve Officer		
Unit Command Chief (CMC, CSC, CC)		
Sector Command Chief		
District Command Master Chief		
MLC Command Master Chief		
Area Command Master Chief		
Master Chief Petty Officer of the Coast Guard Reserve Force		
Master Chief Petty Officer of the Coast Guard		

Tab Five

Enlisted IDP "A" School Qualification Criteria Worksheet

Desired "A" School:

"A" Schools Qualified for:

ASVAB Scores: (filled in by unit or supervisor)	GS	AR	WK	PC	MK	EI	AS	MC	AO	VE	
AFQT Score:											

The "A" school waiting list is available on the Coast Guard Personnel Command web site:
http://www.uscg.mil/hq/cgpc/epm/default.html

Qualification score by rating (Refer to ALCOAST 318/04):

AET: MK + EI + GS = 172 with a minimum AR of 52 or an AFQT = 65
AMT: AR + MC + AS + EI = 220 with a minimum AR of 52 or an AFQT = 65
AST: VE + MC + AS = 162 with a minimum AR of 52 or an AFQT = 65
BM: AR + VE = 100
DC: VE + MC + AS = 155
EM: MK + EI + GS = 153 with a minimum AR of 52
ET: MK + EI + GS = 172 and a minimum AR of 52 or an AFQT = 65
FS: VE + AR = 105
GM: AR + MK + EI + GS = 209
HS: VE + MK + GS + AR = 207 with a minimum AR of 50
IT: MK + EI + GS = 172 with a minimum AR of 52 or an AFQT = 65
MK: AR + MC + AS = 154 OR VE + AR = 105
MST: VE + AR = 114 with a minimum MK of 56
OS: VE + AR = 105
PA: VE + AR = 109 with a minimum VE of 54
PS: VE + AR = 100
SK: VE + AR = 105 with a minimum VE of 51
YN: VE + AR = 105

Qualifying Factors:	Notes
National Agency Check (NAC)	
Security Background Investigation (SBI)	
Flight Physical Completed	
Normal Color Perception	
U. S. Citizen	

Enlisted IDP E-2 to E-3 Advancement Checklist

Complete the following requirements prior to advancement to Seaman/Fireman/Airman (E-3).

Date Completed	Requirement/Task	Reference
	Enlisted Employee Review – (completed via Direct Access) - Due in Jan (all) & July (AD only)	COMDTINST M1000.6 (series) (Art 5.c)
	Demonstrate proficiency in E-3 EPME Performance Requirements. Know and comprehend E-3 EPME Knowledge Requirements	COMDTINST M1510.2 (series)
	6 months in pay grade E-2 or satisfactory completion of Class "A" School	COMDTINST M1000.6 (series) (Art 5.c)
	Comply with Weight Standards	COMDTINST M1020.8 (series)
	CO recommendation for advancement	COMDTINST M1000.6 (Art 5.c)

Advancement/Commissioning Paths Available

	Striker Program SN to BM, DC, FS, YN, SK, PS (Reserve Only), FN to MK, EM, or DC	COMDTINST M1000.6 (series) (Art 5.e)
	"A" School Selection ***Refer to "A" School sheet that precedes this page***. Current Critical Ratings (see applicable ALCGENL) For critical ratings-- 4 month requirement for an E-2/E-3 at first unit is waived (see applicable ALCGENL) Track for placement on A School list: www.uscg.mil/hq/cgpc/epm/default.html	COMDTINST M1500.10 (series)
	Understanding of "A" School Eligibility Requirements • Qualifying ASVAB/AFQT score • Normal Color Perception/Normal Hearing • Security Clearance (SF-86) • Submit Training Request Form CG-5286 • U.S. Citizenship (also needed for reenlistment)	COMDTINST M1500.10 (series)
	Airman Program Personnel on the AMT, AST, AET "A" School Wait Lists will receive Air Station orders 4 months prior to "A" School convening date. Flight physical.	http://cgweb.arsc.uscg.mil/attc/Prospective_Students/Airman.htm
	Commissioning Paths: Four year degree Academy option Officer Candidate School (OCS)	 http://www.cga.edu/ http://gocoastguard.com

Notes:

Enlisted IDP E-3 to E-4 Advancement Checklist

Complete the following requirements prior to advancement to Petty Officer Third Class (E-4).

Date Completed	Requirement/Task	References
	Enlisted Employee Review – (completed via Direct Access) - Due in Feb (all) & Aug (AD only)	COMDTINST M1000.6 (series) (Art 5.c)
	6 months in pay grade E-3	COMDTINST M1000.6 (series) (Art 5.c)
	Successful completion of E-3/E-4 EPME AQE (45 questions, 80% minimum needed to pass)	ESO
	Comply with Weight Standards	COMDTINST M1020.8 (series)
	CO recommendation for advancement	COMDTINST M1000.6 (series) (Art 5.c)
	Striker: Rating correspondence course completions	ESO
	Striker: Demonstrate Rating Performance Based Qualifications (PBQ)	SUPERVISOR
	Striker: Message requesting placement on advancement list	UNIT ADMIN
	Demonstrate proficiency in E-4 EPME Performance Requirements. Know and comprehend E-4 EPME Knowledge Requirements	COMDTINST M1510.2 (series)

Advancement/Commissioning Paths Available

	Striker Program: SN to BM, DC, FS, YN, SK, PS (Reserve Only), FN to MK, EM, or DC	COMDTINST M1000.6 (series) (Art 5.e)
	"A" School Selection Current Critical Ratings (see applicable ALCGENL) For critical ratings-- 4 month requirement for an E-2/E-3 at first unit is waived (see applicable ALCGENL) Track for placement on A School list: www.uscg.mil/hq/cgpc/epm/default.html	COMDTINST M1500.10 (series)
	Understanding of "A" School Eligibility Requirements • Qualifying ASVAB/AFQT score • Normal Color Perception/Normal Hearing • Security Clearance (SF-86) • Submit Training Request Form CG-5286 • U.S. Citizenship (also needed for enlistment)	COMDTINST M1500.10 (series)
	Airman Program Personnel on the AMT, AST, AET "A" School Wait Lists will receive Air Station orders 4 months prior to "A" School convening date. Flight physical.	http://cgweb.arsc.uscg.mil/attc/Prospective_Students/Airman.htm
	Future CG Professional Development Opportunity to consider : OCS	http://gocoastguard.com

Notes:

Enlisted IDP E-4 to E-5 Advancement Checklist

Complete the following requirements prior to advancement to Petty Officer Second Class (E-5).

Date Completed	Requirement/Task	References
	Enlisted Employee Review – (completed via Direct Access) - Due in Mar (all) & Sep (AD only)	COMDTINST M1000.6 (series) (Art 5.c)
	Demonstrate proficiency in E-5 EPME Performance Requirements. Know and comprehend E-5 EPME Knowledge Requirements	COMDTINST M1510.2 (series)
	6 months in pay grade E-4 in current rating	COMDTINST M1000.6 (series) (Art 5.c)
	Comply with Weight Standards	COMDTINST M1020.8 (series)
	CO recommendation for advancement	COMDTINST M1000.6 (series) (Art 5.c)
	Good Conduct Eligibility	COMDTINST M1000.6 (series) (Art 5.c)
	Enroll in rating correspondence course	ESO
	Demonstrate Rating Performance Based Qualifications (PBQ)	SUPERVISOR
	Order rating EOCT if necessary (check w/Unit ESO)	ESO
	Successful completion of rating EOCT	ESO
	Fulfill any special requirements for certain ratings (i.e. Sea Time)	COMDTINST M1000.6 (series) (Art 5.c)
	Message requesting placement on supplemental advancement list	UNIT ADMIN
	Verify, change (if needed) & sign your Personal Data Extract (PDE)	COMDTINST M1000.6 (series) (Art 5.c)
	Meet eligibility requirements listed above by 01 February for the May SWE or 01 August for the November SWE (AD)	COMDTINST M1000.6 (series) (Art 5.c)
	Complete and meet eligibility requirements listed above by 01 July for the October SWE (Reserves)	COMDTINST M1000.6(series) (Art 5.c)
	Study SWE materials (rating and EPME)	http://www.uscg.mil/hq/psc/adv.htm

Advancement/Commissioning Paths Available

	Future CG Professional Development Opportunities to consider • Pre-commissioning Program for Enlisted Personnel (PPEP) • OCS	http://www.gocoastguard.com/dc/dcprograms/ppep.htm http://gocoastguard.com

Notes:

Enlisted IDP E-5 to E-6 Advancement Checklist

Complete the following requirements prior to advancement to Petty Officer First Class (E-6).

Date Completed	Requirement/Task	References
	Enlisted Employee Review – (completed via Direct Access) - Due in April (all) & October (AD only)	COMDTINST M1000.6 (series) (Art 5.c)
	Demonstrate proficiency in E-6 EPME Performance Requirements. Know and comprehend E-6 EPME Knowledge Requirements	COMDTINST M1510.2 (series)
	12 months in pay grade E-5 in current rating	COMDTINST M1000.6 (series) (Art 5.c)
	Successful completion of E-5/E-6 EPME AQE (45 questions, 80% needed to pass)	ESO
	Comply with Weight Standards	COMDTINST M1020.8 (series)
	CO recommendation for advancement	COMDTINST M1000.6 (series) (Art 5.c)
	Good Conduct Eligibility	COMDTINST M1000.6 (series) (Art 5.c)
	Enroll in rating correspondence course	ESO
	Demonstrate E-6 Rating Performance Based Qualifications (PBQ)	SUPERVISOR
	Order rating EOCT if necessary (check w/Unit ESO)	ESO
	Successful completion of rating EOCT	ESO
	Fulfill any special requirements for certain ratings (i.e. Sea Time)	COMDTINST M1000.6 (series) (Art 5.c)
	Message requesting placement on supplemental advancement list	UNIT ADMIN
	Verify, change (if needed) & sign your Personal Data Extract (PDE)	COMDTINST M1000.6 (series) (Art 5.c)
	Meet eligibility requirements listed above by 01 February for the May SWE or 01 August for the November SWE (AD)	COMDTINST M1000.6 (series) (Art 5.c)
	Complete and meet eligibility requirements listed above by 01 July for the October SWE (Reserves)	COMDTINST M1000.6 (series) (Art 5.c)
	Study SWE materials (rating and EPME)	http://www.uscg.mil/hq/psc/adv.htm

Advancement/Commissioning Paths Available

	Future CG Professional Development Opportunities to consider • Special Assignments • Advanced Education Programs • CWO • OCS • Silver Badge • ACE accreditation/Degree	COMDTINST M1000.6 (series) Art 1.d Art 1.b

Notes:

Enlisted IDP E-6 to E-7 Advancement Checklist

Complete the following requirements prior to advancement to Chief Petty Officer (E-7).

Date Completed	Requirement/Task	References
	Enlisted Employee Review – (completed via Direct Access) - Due in May (all) and November (AD only)	COMDTINST M1000.6 (series) (Art 5.c)
	Demonstrate proficiency in E-7 EPME Performance Requirements. Know and comprehend E-7 EPME Knowledge Requirements	COMDTINST M1510.2 (series)
	24 months in pay grade E-6 immediately preceding the terminal eligibility date (01 January following the May SWE)	COMDTINST M1000.6(series) (Art 5.c)
	Comply with Weight Standards	COMDTINST M1020.8 (series)
	CO recommendation for advancement	COMDTINST M1000.6 (series) (Art 5.c)
	Good Conduct Eligibility (24 months prior to the terminal eligibility date)	COMDTINST M1000.6 (series) (Art 5.c)
	Fulfill any special requirements for certain ratings (i.e. Sea Time)	COMDTINST M1000.6 (series) (Art.5.c)
	Verify, change (if needed) & sign your Personal Data Extract (PDE)	COMDTINST M1000.6 (series) (Art 5.c)
	Meet eligibility requirements listed above by 01 February for the May SWE	COMDTINST M1000.6 (series) (Art 5.c)
	Complete and meet eligibility requirements listed above by 01 July for the October SWE (Reserves)	COMDTINST M1000.6 (series) (Art 5.c)
	Study SWE materials (rating and EPME)	http://www.uscg.mil/hq/psc/adv.htm
	If above the SWE Advancement cut, submit Electronic Training Request for CPO Academy	COMDTINST 1500.15F, COMDTINST M1000.6 (series) (Art 5.c)

Advancement/Commissioning Paths Available

	Future CG Professional Development Opportunities to consider • Special Assignments • Advanced Education Programs • Officer Candidate School (OCS) • Chief Warrant Officer (CWO) • ACE accreditation/Degree	COMDTINST M1000.6 (series) Art 1.d Art 1.b

Notes:

Enlisted IDP E-7 to E-8 Advancement Checklist

Complete the following requirements prior to advancement to Senior Chief Petty Officer (E-8).

Date Completed	Requirement/Task	References
	Enlisted Employee Review – (completed via Direct Access) - Due in September (all)	COMDTINST M1000.6 (series) (Art 5.c)
	Demonstrate proficiency in E-8 EPME Performance Requirements. Know and comprehend E-8 EPME Knowledge Requirements	COMDTINST M1510.2 (series)
	24 months in pay grade E-7 immediately preceding the terminal eligibility date (01 January following the May SWE)	COMDTINST M1000.6 (series) (Art 5.c)
	10 years Time in Service (AD)	COMDTINST M1000.6 (series) (Art 5.c)
	Successful completion of E-7/E-8 EPME AQE (45 questions, 80% needed to pass)	ESO
	Graduated from CG CPO Academy or DOD equivalent	COMDTINST 1500.15 (series), COMDTINST M1000.6 (series) (Art 5.c)
	Comply with Weight Standards	COMDTINST M1020.8 (series)
	CO recommendation for advancement	COMDTINST M1000.6 (series) (Art 5.c)
	Good Conduct Eligibility (24 months prior to the terminal eligibility date)	COMDTINST M1000.6 (series) (Art 5.c)
	Fulfill any special requirements for certain ratings (i.e. Sea Time)	COMDTINST M1000.6 (series) (Art 5.c)
	Verify, change (if needed) & sign your Personal Data Extract (PDE)	COMDTINST M1000.6 (series) (Art 5.c)
	Meet eligibility requirements listed above by 01 February for the May SWE	COMDTINST M1000.6 (series) (Art 5.c)
	Complete and meet eligibility requirements listed above by 01 July for the October SWE (Reserves)	COMDTINST M1000.6 (series) (Art 5.c)
	Study SWE materials (rating and EPME)	http://www.uscg.mil/hq/psc/adv.htm

Advancement/Commissioning Paths Available

	Future CG Professional Development Opportunities to consider • Silver Badge/CMC • Special Assignments • Senior Enlisted Academies • Advanced Education Programs • ACE accreditation/Degree • Officer Candidate School (OCS) • Chief Warrant Officer (CWO)	COMDTINST M1000.6 (series) Art 1.d Art 1.b

Notes:

Enlisted IDP E-8 to E-9 Advancement Checklist

Complete the following requirements prior to advancement to Master Chief Petty Officer (E-9).

Date Completed	Requirement/Task	References
	Enlisted Employee Review – (completed via Direct Access) - Due in November (all)	COMDTINST M1000.6 (series) (Art 5.c)
	Demonstrate proficiency in E-9 EPME Performance Requirements. Know and comprehend E-9 EPME Knowledge Requirements	COMDTINST M1510.2 (series)
	24 months in pay grade E-8 immediately preceding the terminal eligibility date (01 January following the May SWE)	COMDTINST M1000.6 (series) (Art 5.c)
	12 years Time in Service (AD)	COMDTINST M1000.6 (series) (Art 5.c)
	Comply with weight standards	COMDTINST M1020.8 (series)
	CO recommendation for advancement	COMDTINST M1000.6 (series) (Art 5.c)
	Good Conduct Eligibility (24 months prior to the terminal eligibility date)	COMDTINST M1000.6 (series) (Art 5.c)
	Verify, change (if needed) & sign your Personal Data Extract (PDE)	COMDTINST M1000.6 (series) (Art 5.c)
	Meet eligibility requirements listed above by 01 February for the May SWE	COMDTINST M1000.6 (series) (Art 5.c)
	Complete and meet eligibility requirements listed above by 01 July for the October SWE (Reserves)	COMDTINST M1000.6 (series) (Art 5.c)
	Study SWE materials (rating and EPME)	http://www.uscg.mil/hq/psc/adv.htm

Advancement/Commissioning Paths Available

	Future CG Professional Development Opportunities to consider • Silver Badge/CMC • Special Assignments • Senior Enlisted Academies • Advanced Education Programs • ACE accreditation/Degree • Officer Candidate School (OCS) • Chief Warrant Officer (CWO)	COMDTINST M1000.6 (series) Art 1.d Art 1.b

Notes:

Tab Seven

Enlisted IDP Professional Goal-Setting Worksheet

Professional Goals
I joined the Coast Guard because…
Short-term Goals (This is usually 3 to 12 months out.): **Targeted Completion Date** Example: I want to be qualified in _____ so that I can _____.
1) Steps to take to reach goal: 2) Steps to take to reach goal:
Long-term Goals (This is usually 1 to 5+ years out.): **Targeted Completion Date** Example: I want to make E-5.
1) Steps to take to reach goal: 2) Steps to take to reach goal:

Enlisted IDP Personal Goal-Setting Worksheet

Personal Goals	
Short-term Goals (This is usually 3 to 12 months out.): Example: I want to volunteer in the community, specifically to help disabled children.	**Targeted Completion Date**
1) Steps to take to reach goal: 2) Steps to take to reach goal:	
Long-term Goals (This is usually 1 to 5+ years out.): Example: I want to have a family.	**Targeted Completion Date**
1) Steps to take to reach goal: 2) Steps to take to reach goal:	

Enlisted IDP Educational Goal-Setting Worksheet

The first-termer or enlisted member should arrange a meeting with their Education Services Officer or Career Development Advisor to discuss the education topics below.

Educational Topics		
Topics	**v**	**Notes**
Montgomery GI Bill (MGIB)		
Tuition Assistance		
CG Schools		
Correspondence Courses		
CG Institute (Military Credit)		
CLEP		
DANTES		
US Military Apprentice Program (MAP)		
Education Services Officer		
Career Development Advisor		

Educational Goals
Short-term Goals (This is usually 3 to 12 months out.): **Targeted Completion Date** Example: I want to register for college and apply for Tuition Assistance.
1) Steps to take to reach goal: 2) Steps to take to reach goal:
Long-term Goals (This is usually 1 to 5+ years out.): **Targeted Completion Date** Example: I want to receive my Associate's degree in accounting.
1) Steps to take to reach goal: 2) Steps to take to reach goal:

Enlisted IDP Financial Goal-Setting Worksheet

Financial Topics			
Supervisor is to explain to member the services available and the benefits of each. Refer to the EPME Study Guide available at http://learning.uscg.mil/epme/. Work with member to set goals, if the member desires to do so.			
Direct Deposit		Savings Plan	
Allotments		Debt Elimination	
Leave & Earnings Statement (LES)		Investments	
Government Credit Card		Credit & Loans	
Checking Account/Debit Card		Meet with Financial Counselor	
Thrift Savings Plan (TSP)		Coast Guard Mutual Assistance (CGMA)	

Short-term Goals (This is usually 3 to 12 months out.): **Targeted Completion Date**
Example: I want to start a retirement account by signing up for the Thrift Savings Plan

1)

Steps to take to reach goal:

2)

Steps to take to reach goal:

Long-term Goals (This is usually 1 to 5+ years out.): **Targeted Completion Date**
Example: I want to purchase a house.

1)

Steps to take to reach goal:

2)

Steps to take to reach goal:

Tab Eight

Enlisted IDP Reservist Information Worksheet

This sheet to be updated every drill period and renewed annually during the month of October. Shaded areas to be updated monthly.	
Civilian Occupation:	
Mobilization/CPRL Assignment(s):	
Mobilization/CPRL Qualification Codes Required:	
Required Mobilization/CPRL Billet Related Training:	
Anniversary Date: dd/mm/yy	**Annual Screening Questionnaire Completed:** dd/mm/yy
Dental Exam: dd/mm/yy **Due:** **Completed:**	**Physical Exam:** dd/mm/yy (Required every 5 years, over 50 annually) **Due:** **Completed:**

IDT Drills

Date: mm/yy	# Drills Planned	Planned Activities/ Outcomes	# Drills Completed	Activities/outcome Completed

ADT - Annual Training

	mm/yy	Planned Activities/Outcomes	"C" School or OJT
Current Year			
One Year Out			
Two Years Out			
Three Years Out			

Other Duty Planned

Enlisted IDP Resources

1. Coast Guard Career Central: www.uscg.mil/careercentral
2. CG Central: http://cgcentral.uscg.mil (My Workspace: Career Management: Enlisted)
3. Coast Guard Institute: www.uscg.mil/hq/cgi/index.html
4. Coast Guard Personnel Manual, COMDTINST M1000.6 (series): http://www.uscg.mil/ccs/cit/cim/directives/
5. Coast Guard Training and Education Manual, COMDTINST M1500.10 (series) http://www.uscg.mil/ccs/cit/cim/directives/
6. Enlisted Performance Qualifications Manual, COMDTINST M1414.8 (series) http://www.uscg.mil/ccs/cit/cim/directives/
7. EPME Manual, COMDTINST M1510.2: http://www.uscg.mil/ccs/cit/cim/directives/
8. EPME Online Study Guide: http://learning.uscg.mil/epme/
9. Leadership Development Center (LDC) Internet links:
    - Chiefs Academy: www.uscg.mil/hq/tcpet/cpoa/index.shtm
    - Chief Warrant Officer Professional Development: www.cga.edu/ldc/chiefwarrantofficerindoctrination/cwois.htm
    - Officer Candidate School (OCS): www.cga.edu/ldc/officercandidateschool/officercandiateschool.htm
10. Personnel Service Center (PSC): http://www.uscg.mil/hq/psc
11. Quick Reference Guides for: PeopleSoft (Direct Access) and UTS (Travel) & Pay and Allowances, SWE Advancement www.uscg.mil/hq/psc/cghrms/index.htm
12. Servicewide Examination (SWE) Guide, PSCINST 1418.1 (series) http://www.uscg.mil/hq/psc/adv/pscinstm1418series.pdf
13. TRACEN "A" Schools:
    - "A" School Waiting List: www.uscg.mil/hq/cgpc/epm/default.html
    - Aviation Technical TRACEN Elizabeth City "A" School Info: www.uscg.mil/hq/attc/
    - TRACEN Petaluma "A" School Info: www.uscg.mil/hq/tcpet/training.shtm
    - TRACEN Yorktown "A" School info: www.uscg.mil/tcyorktown/index.shtm#
14. Unit Leadership Development Program (ULDP): http://learning.uscg.mil/uldp
15. Work-Life Programs: http://www.uscg.mil/hq/g-w/g-wk/wkw/index.htm

Individual Development Plan (IDP) User Guide for Civilians/Officers/Auxiliarists

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Introduction

This developmental tool is intended for use by all Coast Guard civilian employees, officers and Auxiliarists. The need for an Individual Development Plan (IDP) guide and form was identified by the Civilian Needs Assessment (CIVNA) and Junior Officer Needs Assessment (JONA). The IDP is a valuable performance enhancement and career development tool. The following information is designed to acquaint you with the purpose, goals, steps, and value of an IDP.

It is recommended that the supervisor and the subordinate work together on the IDP.

It is recommended that you read the entire guide before you start working on your IDP.

Definition of an IDP

An IDP is a tool to help individuals reach career goals within the context of organizational objectives. It is a developmental "action" plan to move the individual from where they are to where they want to go. It provides the systematic steps to build on strengths and overcome weaknesses as individuals improve job performance and pursue career goals. It is a tool for all personnel regardless of status or performance.

The most common objectives for having an IDP are to:

- Learn new skills to improve current job performance.
- Maximize current performance in support of organizational requirements.
- Increase interest, challenges, and satisfaction in current position.
- Obtain competencies necessary for a promotion or change in grade, series, or field.

Individual Development Plan (IDP) User Guide for Civilians/Officers/Auxiliarists

An IDP is…

An IDP is:

- A developmental partnership between the individual and supervisor. IDP preparation involves feedback, clarification, and discussion about developmental needs, goals, and plans. Supervisor-subordinate communication is key to the success of the IDP process.

- A vehicle to address the needs of the individual and the needs of the organization. The best IDPs begin with a plan to maximize current job performance. The activities can assist the individual in meeting both personal and organizational goals for success.

- A tool to identify a person's developmental needs based on a comparison of skills required by a job and present abilities. It identifies specific competencies for which the person requires development. The mutual interests and concerns of the individual and the organization must be considered in the IDP process.

- A tool to facilitate a relationship between a mentor and a mentee.

- A broadly defined developmental plan that includes on-the-job assignments, self-development activities, and formal classroom training.

- An active and ongoing process. An IDP is a living process that encourages individual empowerment and growth. Ideally, IDPs should be reviewed, updated, and changed as needed every six months.

An IDP is not…

An IDP is not:

- A one-time activity.

- A performance appraisal. The IDP should not be used as a means to formally assess the individual's performance and should not be used for human resources decisions (e.g.,

promotions, etc.). It does not replace the performance evaluation form/system to determine advancements, promotion, pay, awards, etc. The purpose is professional development, not appraisal. *A person's decision not to carry out a developmental activity or achieve a goal should not impact his or her performance evaluation. Correct use of an IDP, however, will likely improve an individual's performance and behaviors.*

- A contract for training. An individual should include all training interests on an IDP. However, training is not necessarily guaranteed because it is on an IDP. Training decisions are made in accordance with Coast Guard policy and budgetary considerations.

- A way to clarify or revise a position description. If a position description does not accurately describe the duties performed, this is a matter for the individual, supervisor, and the personnel office to resolve. An IDP does not solve this problem.

- A guarantee of promotion to a higher grade/rank. An IDP can help prepare a person to become qualified for a higher graded position, but does not imply a guarantee of promotion.

- A fix for all supervisor-personnel relations problems. The IDP is only one part of the comprehensive efforts of an organization to enhance job satisfaction and cooperative work relationships.

Steps to an IDP

There are five basic steps to creating an IDP:

Step 1: Conducting a Self-Assessment
Step 2: Meeting with a Career Counselor or Advisor
Step 3: Meeting with your Supervisor
Step 4: Implementation
Step 5: Follow-up

Note: If you are in a mentor/mentee relationship, you should meet with your mentor before beginning your IDP so the two of you

can strategize the best approach to take as you go through the "Steps to an IDP."

Step 1: Conducting a Self-Assessment

There are different ways to assess your personality, interests, knowledge, skills, and abilities. To make completing an IDP easier, we recommend you conduct a self-assessment and then work with a career counselor to conduct a commercial assessment (see page 6 for information on conducting a commercial self-assessment). In addition, the Coast Guard Institute can conduct an Educational Assessment, which determines how your academic experience can be transferred to a college degree program.

Conducting an assessment of your competencies

To conduct an assessment of your competencies, start by listing your knowledge, skills, and abilities. You can determine what they are by reviewing current and prior job performance and experience, training, education, and developmental activities to identify the knowledge, skills, and abilities you have. This background review provides concrete information regarding current abilities, strengths, and skills. Specifically, employees can review their training record; SF-171, OF-612, or resume; position description; performance evaluations; and any information about significant past training and other developmental activities. Officers can review their training record; performance evaluations; and any information about significant past training and other developmental activities. Go to CG Central (http://cgcentral.uscg.mil): My Workspace: Career Management: Officer for specific career information about you.

Once you have a basic understanding of your current knowledge, skills and abilities, you need to think about where you want to be in a year, two years, three years, etc. from now. Based on the data you have generated about yourself in your self-assessment, write these desires in the form of goals. A goal is a statement of a desired outcome or accomplishment which is specific, observable and realistic. Ask yourself:

- What do I want to accomplish by this time next year?
- What do I want to accomplish by the end of the second year?
- What do I want to accomplish by the end of the ____ year?
- What barriers or obstacles might prevent me from accomplishing my goals on time (e.g., time, money, other commitments, etc.)?
- What can I do to overcome these barriers or obstacles?

- What resources are available to help me?

Conduct research pertaining to any occupations, assignments or positions that you desire. An excellent way to find information on federal government occupations and positions is at http://www.opm.gov. To explore the different types of occupations select Career Opportunities. An excellent way to find information on officer assignments and issues is at the Coast Guard Personnel Command's web site at http://www.uscg.mil/hq/cgpc/opm/opmmain.htm. Next, determine what knowledge, skills, and abilities you need to develop.

Draft your initial IDP following the steps in "The IDP Form" before moving to the next steps. Doing so will enable a career counselor, advisor, or supervisor to better understand your individual needs and goals.

Step 2: Meeting with a Career Counselor

Meeting with a career counselor or advisor is *optional*. However, the objective of meeting with a career counselor is to review the information you have collected and developed so far, conduct a commercial self-assessment if you desire, and learn about goal setting, career fields, and career development resources that are available. A counselor can also assist you with documenting your goals and determining which competencies you need to develop to reach them.

The advantage of working with a Career Development Advisor (CDA), Command Staff Advisor (CSA), Education Services Officer (ESO) or Transition/Relocation Manager (TRM) is that they can often help you learn about opportunities that are available to personnel through the Coast Guard or external sources. They can also inform you about learning activities that may include formal training, a developmental assignment, on the job training, books to read, etc. They can even work with you to link the appropriate developmental activity to the competency and goals. *Keep in mind that you may not find the answer to all your needs or questions from one person since the roles of each of the positions listed vary depending upon their specific role/function in the Coast Guard.* You may need to work with several different types of career counselors or advisors to find the information you need to complete your IDP. See "Who Can Help?" on page 8 for more information on the services of a CSA, CDA, ESO, or TRM.

Individual Development Plan (IDP) User Guide for Civilians/Officers/Auxiliarists

Conducting a commercial self-assessment

A CDA can assist you with a variety of self assessments including the Strong Interest and Confidence Skills Inventory (occupational, basic interest, personal style, etc.), Career Assessment Inventory (career decisions involving college, etc.), etc., which are all available through DANTES. In addition, some TRMs can assist you with the Myers Briggs Type Indicator, etc.

Step 3: Employee/member-Supervisor meeting.

The objectives of the supervisor and direct report meeting are for the supervisor to provide feedback to the individual and to obtain mutual commitment between the supervisor and individual regarding the IDP plan.

Before meeting with the individual, a supervisor should:

- Determine if there are competencies that need to be enhanced to improve performance in the individual's present position.
- Be aware of training resources available.
- Be alert to organizational trends and/or planned changes that require the individual to develop different skills or enhance current skills.

The supervisor should also review *A Supervisor's Guide to Career Development and Counseling for Civilian Employees*, which is available at http://www.uscg.mil/hq/cgpc/cpm/home/supindx.htm.

The individual should provide the supervisor with a draft copy of his/her IDP prior to the meeting and should also bring a copy to the meeting. The supervisor needs to bring an understanding of the organization's needs and ideas or plans for developing the person to the meeting. Together they discuss:

- The individual's goals, interests, and career aspirations
- The organization's needs, expectations, and plans
- Developmental objectives for the individual on which both agree, activities that will achieve the objectives, schedule for activities, check-back points, and possible needs for revising or updating IDP.

Together, they identify those competencies that are critical for the individual to have in order to reach professional career goals and his/her personal developmental needs. Also, they determine how the person can best achieve his/her goals.

The supervisor and individual must work together to adjust and prioritize the objectives of the person's IDP. If a developmental assignment or requested training course is not feasible, the supervisor should discuss the reasons for denial and recommend alternatives.

The individual prepares the final IDP. Both the individual and supervisor sign the IDP form indicating support of the plan. The individual keeps the original IDP and provides a copy to the supervisor.

Step 4: Implementation

The individual implements the development plan, submits training requests as appropriate, actively participates in activities, and updates the supervisor on any changes.

Step 5: Follow-up

The individual should routinely update and review the plan and meet with the supervisor every six months to determine progress and make changes.

The IDP Form

The following guidance will assist you in filling out the IDP form (Enclosure (4)).

General Information

Provide name, position title, grade or rank, and unit.

State your goals

Goals can be written in any format you choose. Begin by writing your goal for your **current position**. Next write your **short-term** future professional development goals. (Your current position goal and your short-term goal can be the same. If they are the same, there is no need to duplicate your work by listing them in both sections.) Short-term goals are generally actions you want to achieve within the next one to two years. Finally, write your long-term future professional development goals. Long-term goals are generally actions you want to accomplish within three to five or more years.

Goals can be written in any format you choose. You can specify a rank, position, series, and grade (e.g., Lieutenant, Commanding Officer, Program Analyst GS-343-9), or simply a new qualification, skill, title, role, or private sector profession you wish to achieve (e.g., Team Leader, Senior Accountant). The more specific the plan, the better you can identify developmental activities that can help you reach your goal.

Identify competencies to be developed

Identify those competencies (knowledge, skills, and abilities) that you want to develop for each of your goals. Civilians will find competencies critical for their current job in their EARS performance plan and job position description. Officers will find critical competencies at CG Center (http://cgcentral.uscg.mil under My Workspace: Career Management: Officer). You may also determine which areas need development with input from your supervisor.

Also, refer to the research you did in your assessment to identify the competencies you will need for your short-term and long-term professional goals. Identify those competencies that are critical for you to have in order to reach professional career goals and your personal developmental needs. With input from your supervisor, determine which areas will best help you reach your goals.

List developmental activities or actions to be taken

Identify a developmental activity for each targeted competency. Explore developmental activities in the areas of *education* (e.g., a community college course in effective writing, accounting), *training* (e.g., on-the-job training such as assisting co-workers with duties or projects or formal classroom training such as a "C" School) and *professional development* (e.g., reading, joining Toastmasters, joining a professional organization). *Note:* All formal classroom training should have the source (e.g., USDA, Coast Guard Leadership and Management School) identified. For all activities, indicate the intended completion date.

List outcomes desired

Identify what outcome you desire to achieve by obtaining that competency. For example, if a competency you desire is to develop your oral communication skills, your desired outcome may be that you can effectively communicate with others on your work team.

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Signatures

Both you and your supervisor need to sign and date your completed IDP. Fill in the 6 month and 1 year review dates.

Resources

Who can help?

The Coast Guard has a variety of experts and advisors in place to assist you with career information and/or planning. The knowledge and services of these personnel will vary depending on their job/role and their individual experience. You may have to work with several career counselors or advisors to get the assistance you need.

CG Career Development Advisor

CDAs are located at Integrated Support Commands, TRACEN Cape May and the Headquarters Support Command. CDAs can assist you with career planning, professional development, educational development, and leadership development. They provide unit-wide and individual career development, as well as information pertaining to careers. CDAs are trained in how to develop an IDP.

CG Transition/Relocation Manager

TRMs are located at Integrated Support Commands, TRACEN Cape May, and the Headquarters Support Command. TRMs can assist you in identifying your individual attributes, planning an effective and workable career strategy, and providing you feedback on career issues, options, and barriers. TRMs have a variety of career tools and some are certified career coaches.

CG Command Staff Advisor

CSAs are located in twelve geographic sites and provide guidance and consultation to employees and their military and civilian supervisors and managers. The CSA is the first stop for information and assistance concerning civilian personnel issues in the Coast Guard.

CG Education Services Officer

Full-time ESOs are located at every Integrated Support Command (ISC), Sector, Training Center, and various other units. All other units have an individual who serves as a part-time ESO. Once you have set your goals and determined your required activities, an ESO can provide you with information on various educational opportunities. For example, an ESO can assist you with college enrollment, counsel you on non-traditional education programs, assist in completing a Tuition Assistance form, assist in locating scholarships or loans, assist in enrolling in college video and

audio courses, and administer or arrange for the administration of all DANTES sponsored examinations.

Developmental Activities

Remember, education and training are important but **learning** is paramount. Job, career, and personal development involve more than formal classroom training. Individuals are more likely to retain what they learn when actively applying the skill versus learning about it in a classroom. When preparing your IDP, consider all learning activities and assignments that are available to you. Possible activities and assignments include:

Types of learning activities

Special Projects - Work of infrequent nature given to an individual whose normal range of duties would not include that assignment. For example, to enhance planning skills, the individual may be asked to participate in developing a schedule, organizing a meeting/conference, etc.

Detail - A temporary assignment to another position, work unit, branch, division, or office. For example, to enhance writing skills and the ability to work as a team member, a person may be assigned to a task force organized to create a handbook describing a new program.

Shadow Assignments – The opportunity to accompany a technical expert or manager for a brief period to better understand the type of work being performed. For example, “shadowing” a civil rights specialist may increase one’s knowledge of affirmative action plans and programs.

Job Rotation - Temporary reassignment of duties from another position, but within the same occupational area, to the person’s position in order to broaden the individual. For example, a personnel management specialist that is normally involved in the staffing function could take on classification responsibilities.

Collateral Duties - Assignment of duties outside an individual’s normal range of responsibilities that provide a broadening experience. For example, a person may be assigned space planning responsibilities in order to enhance analytical and reporting skills.

Job Redesign - Assignment of new responsibilities to a position for the purpose of utilizing an individual's natural abilities or interests. For example, assigning liaison responsibilities to an individual who would otherwise not deal with people outside their immediate work unit.

Committee/Task Force Participation - Involvement in workforce groups or special emphasis groups. For example, participation in Human Relations Committees.

Professional Organizations – Joining and/or volunteering with these organizations offers opportunities for the individual to develop a variety of organizational and leadership skills. Examples include, American Society of Military Comptrollers, American Society of Training and Development, Reserve Officer Association, Toastmasters, etc.

"*Acting" Assignments* - Temporary assignment of oversight responsibilities to an individual. In most cases, these responsibilities are to cover for a manager or supervisor that is out of the office.

Discussion Groups - Groups arranged with co-workers (to take place during lunch or after duty hours) for the purpose of researching and discussing technical, managerial, or supervisory skill areas.

Other options

You can also read articles and books (one recommended source is the Commandant's Reading List), volunteer, do some research, interview senior/technical people, ask a co-worker to teach you a skill, train someone else, etc.

Where to find CG training information

Look for internal Coast Guard training information in the annual training schedule available on the Training Quota Management Center's (TQC) web site, http://www.uscg.mil/hq/tqc/index.htm. Coast Guard wide Leadership and Professional Development courses can be found at http://www.uscg.mil/leadership (click on Training).

Where to find career and professional development information

Coast Guard Career Central web site, http://www.uscg.mil/leadership (click on Career Central), is a central point for Coast Guard career, training, education and

professional development information for all Coast Guard personnel: active duty, civilian, reserve, and auxiliary. Also check CG Central under My Workspace.

The Unit Leadership Development Program (ULDP), http://learning.uscg.mil/uldp, is designed to assess a unit's strengths and weaknesses in relation to the Coast Guard's leadership competencies. Leaders can review and share unit results with the crew, choose from a host of resources, and choose to partner with a ULDP coach to determine the most appropriate action to take.

The E-mentoring program, http://www.uscg.mil/leadership (click on Mentoring), contains a dynamic database in which people can sign up to be mentors and people can search for mentors. In addition to the database, the program supports mentors and mentees by creating a mentoring agreement and providing just-in-time instructions and automated notifications for key activities.

To print or download a copy of this guide and form go to http://www.uscg.mil/leadership and click on “Individual Development Plan” or http://learning.uscg.mil/uldp and click on Individual Development Plan.

U. S Department of Homeland Security CG-6021 (10-05)	Individual Development Plan (IDP) for Coast Guard Civilians/Officers/Auxiliarists

Name:	**Unit/flotilla**:

Position Title and Grade/Rank:

Developmental Goals for Current Job

Goals:

Competency (Knowledge/Skill/Ability) to develop	Developmental Activity, On-the-job Training, Education or Classroom Training	Outcome Desired	Intended Completion Date & Cost

PRIVACY ACT STATEMENT, 5 U.S.C. 552(a) Privacy Act: A. AUTHORITY: 5 U.S.C. 301 Departmental Regulations. B. PURPOSE: To collect information to permit effective IDP counseling. C. ROUTINE USES: The information on this form is to be used by units, supervisors and members in the coaching of employees in career development and goal setting. D. DISCLOSURE: Mandatory for first-term junior officers (active duty and reservists). Voluntary for civilian employees, all other military officers, and Auxiliarists.

Individual Development Plan (IDP) for Coast Guard Civilians/Officers/Auxiliarists

Future Professional Development Goals

Short-term Goals (usually 1-2 years):

Competency (Knowledge/Skill/Ability) to develop	Developmental Activity, On-the-job Training, Education or Classroom Training	Outcome Desired	Intended Completion Date & Cost

Individual Development Plan (IDP) for Coast Guard Civilians/Officers/Auxiliarists

Future Professional Development Goals

Long-term Goals (usually 3-5 plus years):

Competency (Knowledge/Skill/Ability) to develop	Developmental Activity, On-the-job Training, Education or Classroom Training	Outcome Desired	Intended Completion Date & Cost

I will pursue the training and development outlined in this plan. However, I understand that this is not a contract for training. Member Signature:	I will support the training and development outlined in this plan. However, I understand that this is not a contract for training. Supervisor Signature:
Date:	Date:
6 month review date:	1 year review date: