



DEVELOPMENT PLANNING TOOLKIT:



A LEADER'S GUIDE TO BUILDING A CAREER DEVELOPMENT PLAN



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COACHING

DEVELOPMENT PLAN FAQs

1. What is a Development Plan?

A Development Plan is an annual document completed by an employee and approved by their manager to track specific learning and development activities to participate in for the benefit of themselves and the organization.

Development Plans will include short and long-term career goals, key strengths, and development areas. While you may identify many areas of development that you want to explore and develop over time, the plan is designed for you to focus on two goals (one leadership soft-skill and one technical job-related) for the current year. This way the plan is realistic and achievable alongside all of your everyday job responsibilities.

A Development Plan is not a work plan - while it may outline some actions that you will take at work it is not designed to be an operational plan. You should have a separate operational plan that outlines goals and objectives for you and your team.

A draft Development Plan should be discussed with your direct leader and together it can be approved and finalized after a conversation.

2. What are Career Goals?

Career Goals are big picture personal aspirations for your career. They are things you personally want to achieve and accomplish. Career Goals can be thought of as short-term - things you want to happen within 2 years and long-term - things you want to happen between 3-10 years from now. Setting Career Goals not only gives you the clarity you need to proactively manage your career, it also allows you to easily communicate your career direction and desired next role to others.

3. What are Strengths?

A Strength is the ability to consistently provide excellent performance in a specific task or area. You are valued and value yourself for having this competence. Your unique Strengths are a combination of:

1. Knowledge-based skills: Acquired from education and experience (e.g., computer skills, languages, degrees, training and technical ability)
2. Transferable skills: Your portable skills that you take from job to job (e.g., communication and people skills, analytical problem solving and planning skills)
3. Personal traits: Your unique qualities (e.g., dependable, flexible, friendly, hardworking, expressive, formal, punctual, and being a team player)

Knowing your Strengths is important so that you can leverage them in your work and career.



4. What are Development Areas?

Development Areas are specific skills or behaviours (identified through reflection and feedback) that you need to develop to be more effective in your current role. They can also be areas that you need to develop to be successful in your next role. Most people have many areas that they can improve on. Being able to articulate your Development Areas demonstrates that you are self-aware and models to others that you are committed to ongoing learning and growth.

5. How do I choose which Development Areas to make into Development Goals?

Choosing Development Areas to turn into Development Goals is an important step in the development planning process. We often have many things we want to develop and this can be inspiring and overwhelming at the same time. Focusing our development efforts enables us to track progress and see results.

When you focus on two specific Development Goals it doesn't mean that you don't learn and grow in other areas during the year, it just means that you set a specific intention and map out an action plan for only two goals. You need to identify which goals will have the greatest impact. Ask yourself:

1. What specific leadership/soft skill will make the biggest impact on my ability to successfully do my role?
2. What specific technical/job-related skill will make the biggest impact on my ability to successfully do my role?
3. What areas can I make good progress on in a 12-month timeframe?
4. What areas do I already have ideas on for how to move forward?
5. What is happening in the organization and which of my Development Areas will help the organization the most right now?

In the Development Plan draft, you should identify at least one leadership/soft skill and one job technical/job-related skill to build an action plan for. You will then meet with your leader to discuss this and get their feedback.

6. How are my Career Goals and my Development Goals related?

Career Goals are personal aspirations that you want to achieve in your career. Development Goals are goals that will make you better in your current role or prepare for the next role in your organization. Development Goals are often negotiated with your direct leader because the effort and time it will take you to achieve these goals are often done on paid time. Career Goals should inform your development goals. You should share your career goals with your direct leader so they can support you to achieve your aspirations however they can. Sometimes you have Career Goals that are different from the role you are currently in. When that happens you need to balance the needs of the organization with what you want to achieve in your own



career. Great leaders want to know their employees' aspirations even if they mean that one day they will move on from the organization.

7. Who is responsible for what in the Development Planning Process?

Employees are responsible for:

- Drafting their Development Plan and scheduling time with their Manager to review it together
- Obtaining approval (where necessary) to participate in development activities both internally and externally that have been identified on their Development Plans
- Tracking the progress and completion of specific development activities

Managers are responsible for:

- Reviewing and contributing comments to the Development Plan draft
- Communicating clear expectations and guidelines to the Employee concerning:
 - approval and access to internal and external learning opportunities
 - amount of paid work time that is approved to spend on development activities
- Supporting the development process by sharing their time and where appropriate offering ideas and connections that will help the employee be successful

8. How often should I do a Development Plan?

To ensure that you are always developing your skills and preparing for the next role you should do a Development Plan once a year. This will enable you to refresh your goals and plans as things change and evolve in your life, organization, and industry. The process gets easier every year you do it because often you have already done some important groundwork in the first year you complete the process.



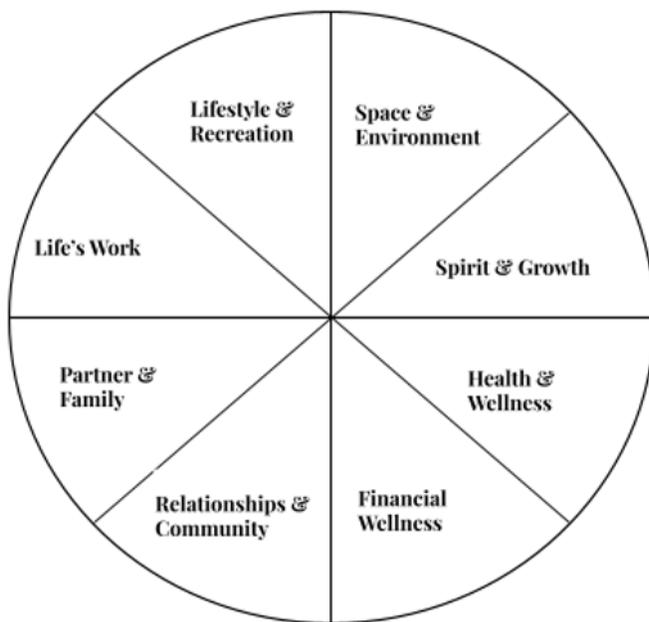
SETTING SHORT & LONG-TERM CAREER GOALS

Career Goals

Setting Career Goals not only gives you the clarity you need to proactively manage your career, it also allows you to easily communicate your career direction and desired next role to others. Defining your Career Goals is a different process for everyone. Some of the factors that impact your thinking are:

1. How linear your profession is
2. The pace of change and growth in your industry
3. Your age and stage in life
4. Your level of ambition
5. Your personal values
6. The opportunities in your current organization

The exercises below will help you gain clarity about where you'd like to take your career and help you determine your best next steps.



Part 1 – Taking Stock of your Current Situation

To help you know where you want to go, you need to “take stock” of what you want to achieve in all the core areas of your life. Jot down some of the things you want to achieve/do in the next few years in each of these areas. Use this wheel or a separate page.

Space & Environment – Physical and energetic surroundings, where you live, work, & play.

Relationships & Community – Relationships with extended family and friends & your community.

Spirit & Growth – Spiritual and/or individual

growth.

Life's Work – Career, volunteer work, & the extent to which you feel like you are doing the right work.

Partner & Family – Relationships with close family members and your romantic partner & children.

Financial Wellness – Your financial picture, beliefs about money, abundance, giving, & wealth.

Lifestyle & Recreation – Leisure and/or work activities that bring you fulfillment, fun, & amusement.

Health & Wellness – Your nutritional, physical, & mental health.



Part 2 – Short-Term Career Goals (1-2 years)

Short-Term Career Goals are things you want to achieve within two years. Some examples might be: achieve a certain designation in your industry, increase your salary, achieve a leadership position, take a course or post-secondary program, etc.

Here are some questions you can consider to help you determine these:

What do I want to learn in the next 1-2 years?	
What is the next position I want to achieve or am I happy in my current role?	
What are some other things that I want to achieve with regards to my career in the next 1-2 years (besides a change in title or a raise in salary)?	

Part 3 – Long-Term Career Goals (3-10 years)

Long-Term Career Goals are things you want to achieve later in your working life – anything beyond three years. Some examples might be: retire, start a business or non-profit, become Operations Manager or CEO, change industries or organizations.

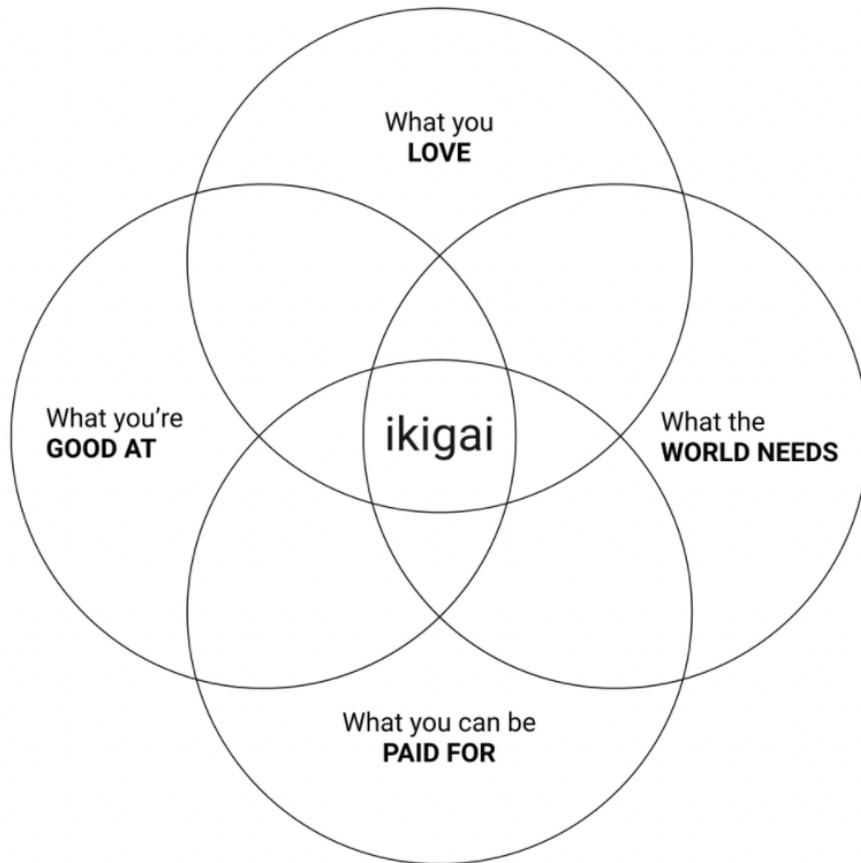
To help you determine longer-term goals you want to start to consider what will truly inspire and fulfill you, what you are passionate about, and what your highest point of contribution to the world could be:

From Greg McKeown's book called *Essentialism*, he encourages you to ask yourself three critical questions. Brainstorm your thoughts for each one below:

1. What do I feel deeply inspired by?
2. What am I particularly talented at?
3. What work or contribution can I make that meets a significant need in the world?



Ikigai is a Japanese concept referring to something that gives a person a sense of purpose, a reason for living. Many people who are trying to determine longer-term Career Goals find it useful to consider the following four areas and jot down whatever thoughts you have on the picture:



Part 4 – Next Steps

1. On a scale of 0-6, how clear are you on your short-term Career Goals (0 not clear at all – 6 very clear)?
2. On a scale of 0-6, how clear are you on your long-term Career Goals (0 not clear at all – 6 very clear)?
3. What do you need to help you gain clarity (coaching, mentoring, research, reflection)?
4. What is your next step?



IDENTIFYING STRENGTHS & DEVELOPMENT AREAS

Strengths Exercises

Exercise 1 – High Five

Complete the free [HIGH 5 Test](#) - an online test helping people identify their core Strengths.

Exercise 2 – Strengthsfinder 2.0

Purchase [Strengthsfinder 2.0](#) (in whatever format you want - hardcover, audio) and complete the included test. This resource has a cost associated with it.

Strengths & Development Areas Exercises

Exercise 3 – Johari Window

Complete the free [Johari Window](#) - an online test helping people identify Strengths and potential blindspots or Development Areas.

Exercise 4 – Do your Own 360

To ensure you have an accurate sense of self (other people in your life/work can sometimes see things that you can't see yourself) you need to ask others for some feedback. By asking people for feedback it gives you the opportunity to take stock of how others are perceiving you as a leader. Ask 3-5 people the following three questions:

1. When you think of me in a leadership role (at work, as a community volunteer, etc.) what three words come to your mind to describe me?
2. What is one thing that you notice about me that might be holding me back from being effective? Please be courageous and share this with me - I really want to develop and become the best I can be!
3. What is one way/reason that I make the world a better place?

Brainstorm themes from your conversations. Question 1 and 3 are about your Strengths and question 2 can help you uncover a potential blindspot or Development Area.

Exercise 5 – Reflect on Past Feedback

Take a few minutes to think about some recent feedback you have received and define what skill that the feedback was about. For example, if you were recently given back a draft of a report and asked to make some significant changes this may signal that you could benefit from developing in the area of business writing.



SAMPLE DEVELOPMENT PLAN

Name: Jane

Title: Executive Director

Date: January, 2022

Part 1 – Identify Career Goals

1. Short-Term Career Goals (1-2 years):
 - a. Develop staff to ensure succession in all Departments
 - b. Further develop leadership skills
 - c. Broaden participation on boards including private companies
 - d. Speak at conferences about non-profit leadership
2. Long-Term Career Goals (3-10 years):
 - a. Ensure that organization is in capable hands for the future when I retire (3-5 years)
 - b. Sit on 2-3 private and not-for-profit boards
 - c. Develop a consulting practice to support non-profit organizations

Part 2 – Identify Strengths & Development Areas

1. List your key Strengths (between 3-6):
 - a. Integrity
 - b. Consistency
 - c. Compassion
 - d. Listening Skills
 - e. Collaboration & Teamwork
2. What Leadership/Soft Skills do you want to develop/work on that will make the biggest impact on your ability to be more effective in your role (brainstorm at least 2)?
 - a. Networking
 - b. Delegation
3. What Technical/Job-Related Skills do you want to develop/work on that will make the biggest impact on your ability to be more effective in your role (brainstorm at least 2)
 - a. Board Leadership and Governance
 - b. Using Cloud Technology
 - c. Succession Planning



Part 3 – Your 12-Month Focused Action Plan

GOAL 1 – Leadership/Soft Skill Development Goal

From Part 2 question 2 above – **choose one Leadership/Soft Skill** that you want to develop in the **next 12 months** and determine specific actions and timelines.

1. Name the Leadership/Soft Skill:
Networking – specifically to build and grow 35 new professional relationships in 2022.
2. Why is this important for you to develop this year? Why did you choose this one?
 - a. Increased networking would lead to more visibility and credibility for the organization.
 - b. It would help me expand opportunities for when I retire and start my consultancy.
3. Results/Outcomes – How will you know you have made progress?
 - a. I will notice that my targeted relationship-building efforts are leading to more interactions with certain groups that I want to develop relationships with.
 - b. I will be invited to new opportunities that will come as a result of being more connected.
4. Resources Needed – money, time, staff, etc.:
 - a. Time
 - b. A focused Relationship Building Strategy
5. Employee Action Steps – What specific actions will you be taking by when?

Actions	Target Date Notes/Questions
1. Develop Bio and Speaker Profile	Jan 31, 2022
2. Develop Relationship Building Strategy	Feb 15, 2022
3. Dedicate 30 minutes weekly to implement strategy	Ongoing
4. Assess progress against my target and edit plan accordingly to achieve it	Quarterly starting March 31, 2022



GOAL 2 - Technical/Job Related Development Goal

From Part 2 question 3 above - **choose one Technical/Job-Related skill** that you want to develop in the **next 12 months** and determine specific actions and timelines.

1. Name the Technical/Job-Related Skill:
Board Leadership & Governance - specifically confidently lead the Board through regular and sub-committee meetings sharing relevant information from bylaws and terms of reference. Effectively onboard new Board members using the process set out in the Board Policy Manual.
2. Why is this important for you to develop this year? Why did you choose this one?
 - a. Activate board Interest and development for continued support and understanding of the organization and our role in the Urban Community.
3. Results/Outcomes - How will you know you have made progress?
 - a. Board will be activated at every meeting - prepared and engaged to contribute.
 - b. I will answer questions more frequently when they arise for the Board.
 - c. I am able to continue to guide the Board through our policies to ensure Board Members are clear in those policies.
 - d. The Board will look to me for answers around governance.
4. Resources Needed - money, time, staff, etc.:
 - a. Time myself and time with our current governance consultants to prepare for each Board meeting.
 - b. Reliable staff to manage filing and coordinating Board materials.
5. Employee Action Steps - What specific actions will you be taking by when?

Actions	Target Date Notes/Questions
1. Review the Board Policy Manual and all relevant governance documents	Jan 31, 2022
2. Actively participate in Board training/ orientation sessions	As they occur in 2022
3. Regular meetings with Consultants to structure Board meetings to be well prepared (include 2 staff members to build their understanding and ability to support the Board)	Ongoing starting in January 2022



DEVELOPMENT PLAN

Name:

Title:

Date:

Part 1 – Identify Career Goals

1. Short-Term Career Goals (1-2 years):
2. Long-Term Career Goals (3-10 years):

Part 2 – Identify Strengths & Development Areas

1. List your key Strengths (between 3-6):
2. What Leadership/Soft Skills do you want to develop/work on that will make the biggest impact on your ability to be more effective in your role (brainstorm at least 2)?
3. What Technical/Job-Related Skills do you want to develop/work on that will make the biggest impact on your ability to be more effective in your role (brainstorm at least 2)?



Part 3 – Your 12-Month Focused Action Plan

Leadership/Soft Skill Development Goal

From Part 2 question 2 above – **choose one Leadership/Soft Skill** that you want to develop in the **next 12 months** and determine specific actions and timelines.

1. Name the Leadership/Soft Skill:
2. Why is this important for you to develop this year? Why did you choose this one?
3. Results/Outcomes – How will you know you have made progress?
4. Resources Needed – money, time, staff, etc.:
5. Employee Action Steps – What specific actions will you be taking by when?

Action	Target Date	Notes/Questions
1.		
2.		
3.		



Technical/Job-Related Development Goal

From Part 2 question 3 above - **choose one Technical/Job-Related skill** that you want to develop in the **next 12 months** and determine specific actions and timelines.

1. Name the Technical/Job-Related Skill:
2. Why is this important for you to develop this year? Why did you choose this one?
3. Results/Outcomes - How will you know you have made progress?
4. Resources Needed - money, time, staff, etc.:
5. Employee Action Steps - What specific actions will you be taking by when?

Action	Target Date	Notes/Questions
1.		
2.		
3.		

