

Development Plan Checklist – Step by Step

Date: _____ Employee Name:

Unit/Area: _____ Program:

Follow these steps for engaging employees & completing the plan	Done (√)
1. Prepare the Employee	
Provide employee with the following materials for the employee to help them prepare: <ul style="list-style-type: none"> • “Employee Self Assessment” & “Development Plan.” • “Tips for Employees.” • Description of core competencies and/or learning options, if appropriate. 	
2. Prepare the development plan	
<ul style="list-style-type: none"> • Review any documentation you may have regarding performance (letters of recognition, rewards, positive feedback, etc.). 	
<ul style="list-style-type: none"> • Reflect both positive and developmental feedback for the employee. 	
<ul style="list-style-type: none"> • Keep development plans focused and limit your plans to 1-3 goals. 	
<ul style="list-style-type: none"> • Use SMART goals. 	
<ul style="list-style-type: none"> • Include training information and expectations in the action plan. 	
<ul style="list-style-type: none"> • Complete the development form, including strategic goals and any additional general skills. 	
3. Meet with the employee	
<ul style="list-style-type: none"> • BE CURIOUS. Encourage the employee to discuss their employee self-assessment first and use it as an opportunity to understand them better. 	
<ul style="list-style-type: none"> • Provide examples of strengths you have observed or specific achievements. • Describe areas for development, also using examples where appropriate and explaining how it will fit with departmental or organizational goals 	
<ul style="list-style-type: none"> • Review of the key points and action steps to be completed 	
<ul style="list-style-type: none"> • Keep a copy of the development plan on the employees working file to review progress at the next meeting (set the date). 	