LEARNING AND DEVELOPMENT NEEDS TOOLKIT

LEARNING DEVELOPMENT PLANS (LDPs) AND PERSONAL DEVELOPMENT PLANS (PDPs)
The matching of individual needs to organisation needs is typically achieved through the process of personal development planning. This section of the Toolkit provides an overview of the matching process. For those interested in undertaking this process, an in-depth Personal Development Plan Workbook has been developed by the OHM. The Workbook is available from the OHM’s website (www.officeforhealthmanagement.ie) and provides an interactive walk-through of the process of identifying needs and developing a personal learning and development plan.

**WHAT IS PERSONAL DEVELOPMENT PLANNING?**

Personal development is an approach that encourages individuals to proactively manage their own learning and development. It also emphasises the importance of lifelong learning. A Personal Development Plan (PDP) is a means for individuals to take responsibility for their own personal development. As Armstrong (2001) describes it:

> A personal development plan sets out the actions people propose to take to learn and develop themselves. They take responsibility for formulating and implementing the plan but they may receive support from the organisation and their managers in doing so.

A PDP provides individuals with a clear framework for assessing their current situation, identifying where they would like to be in the future and developing a plan outlining the learning and development required to get there.

**THE FOCUS OF PERSONAL DEVELOPMENT PLANS**

As emphasised above, it is the individual who is primarily responsible for his or her own personal development plan and who determines the scope of the plan. However, individuals should work with those around them (line manager, peers and direct reports) to identify their needs, and any learning and development needs and opportunities should be discussed with the line manager.

Personal development plans can vary in focus.

- **Job related development** (focusing solely on the individual at work)
  
  The development objectives are closely aligned with departmental or organisational objectives and the plan may focus on the individual development needs required for enhanced performance in the current job.

- **Career development** (focusing on the career development of the individual)
  
  This ensures the alignment of individual career planning and organisation career-management processes so that the optimal match of individual and organisation needs is achieved (Walton, 1999). Many organisations offer opportunities for career-related training as a means to attract and retain ambitious and highly-motivated staff.

- **Non-work related development** (focusing on the development of non-work related skills, the absence of which may be limiting the overall personal effectiveness of the individual)
  
  Examples include learning a foreign language, going to the gym, etc and this kind of development can help to decrease stress-related illnesses and aid in the achievement of work-life balance for the individual.

- **Holistic development** (combining a mixture of all three development approaches mentioned above, emphasising the person as a whole in all aspects of life).
  
  Some people argue that this holistic approach elicits higher levels of employee commitment and motivation. Others argue that it delves too deeply, and individuals may feel more comfortable if this depth or breadth is optional rather than obligatory.

**THE POTENTIAL BENEFITS OF PERSONAL DEVELOPMENT PLANS**

**Benefits to the organisation**

- **Facilitates the achievement of business goals**
  
  You are responsible as a manager for the achievement of organisational/service goals, and the delivery of a quality service to a set standard. Training and development can ensure that your staff reach and maintain the required standard, and help you in the achievement of goals. The Chartered Institute of Personnel and Development (1998) collected evidence over a seven-year period from one hundred medium-sized organisations which showed that human resource management practices that incorporate a
highly-developed approach to employee development (such as personal development planning), can yield extensive gains for the organisation, with an impact far outstripping investment in either technology or research and development.

**Development focused on job-related needs**

Where personal development plans are agreed between a line manager and the individual members of his/her team, they have the potential to focus development resources and activities on job-related learning needs.

**Shows that the Organisation Cares**

The presence of personal development planning also serves to demonstrate the value the organisation places on its employees. Its presence alone conveys a positive message to employees, serving to engender employee commitment and motivation, and can help to create the reputation of the organisation as a ‘developer of people’.

Beaucoup (cited in Shechtman 1999) suggests that ‘… companies succeeding in the competitive (labour) market are those that recognise and respond to their employees’ life needs, not just their professional requirements … [and] investment in personal growth and development creates a culture that cares for its employees – one that embodies trust, honesty, integrity, opportunity and accountability’.

**Key component of developing a learning organisation**

PDPs can help in making training and personal development an integral part of daily activities, where learning becomes a continuous process, closely related to actions in the workplace.

**Increases employee retention**

Argyris (1998) and Altman (1998) provide evidence for this, indicating that employee retention is achieved through the enhanced levels of organisational commitment and employee motivation that personal development planning tends to generate.

**A return on investment**

Training and development initiatives are likely to yield a higher return on investment and be more effective in an environment where personal development planning is in operation. There are several reasons for this:

- **focused training** and development initiatives – the structure of training and development can be focussed specifically to the needs of the individual and the needs of the job
- **motivated to learn** – It has been suggested that individuals tend to be more motivated to learn when they are managing their own learning. This in turn, implies that individuals will be motivated to extract as much as possible from learning initiatives (Bond 1994)
- **cost effective** – personal development planning can provide a cost-effective means of staff development in that plans do not necessarily refer directly to training courses, rather they are more likely to stipulate other less costly development interventions (such as shadowing, job rotation, on-the-job coaching, etc).

**Benefits to the individual**

- **Gives individuals greater control over their destiny**
  
  Personal development planning is about giving choice to individuals to manage their own development and their own careers. The process helps individuals to formalise their various development needs and encourages them to devise an action plan detailing the activities they must undertake to fulfil those needs.

- **Achieving work-life balance**
  
  If a holistic, person-centred approach is adopted, the process will assist employees in considering all aspects of their life and will highlight those areas where changes may be necessary. In doing so, the process may assist the individual in striking an effective work-life balance.

- **Enhanced employability**
  
  Personal development planning may serve to enhance the employability and marketability internally and externally of the individual through the provision of development opportunities that enable the individual to acquire transferable skills and competencies.

- **Other benefits**
  
  PDPs can help individuals to acquire more quickly and comprehensively the skills and knowledge needed for their role. They can also lead to a growing ability to take on a greater variety of tasks. The process of developing a PDP allows time for the individual and the manager to get better acquainted. It is also known to help people to focus their career plan within the organisation and to provide them with a greater interest in, and sense of responsibility for, their work.
THE PERSONAL DEVELOPMENT PLANNING PROCESS

In engaging in a process of Personal Development Planning, an individual can expect to go through a number of steps. These steps are summarised in the following diagram and are then outlined in more detail.

Step 1 PDP introduction
- The starting point for PDP is to contact your organisation's training and development department or your line manager, as a means of providing you with all necessary information
- Arrange to attend the next personal development planning workshop
- Read the introductory sections of your Personal Development Planning Workbook (available to download from www.officeforhealthmanagement.ie)

Step 2 Personal evaluation (strengths and development needs)
- Begin to complete your Personal Development Planning Workbook
- Identify your strengths and development needs. In order to do this you may wish to
  - complete self discovery instruments
  - ask others for feedback on your performance
  - use a 360 degree questionnaire in getting feedback

Step 3 Prepare and agree development plan
- Meet with line manager to
  - receive feedback
  - share your PDP workbook
  - discuss and agree development opportunities
  - design your development plan based on information received

Step 4 Review and continue
- Personally review your plan every 3-4 months and ensure you are monitoring progress in completion of your plan
- Arrange to meet with your manager every 6-12 months to discuss your plan
- Modify and update your plan on an ongoing basis
- Return to Step 2
IMPLEMENTATION OF PERSONAL DEVELOPMENT PLANNING

The decision to implement a Personal Development Planning initiative requires up-front planning and demands that a number of issues are addressed. From research carried out by the Office for Health Management the major issues to be addressed include the following.

- **Participant support**
  Lessons learned from piloting personal development planning in the health sector indicated that participants appreciate being able to attend an introductory session on the personal development planning principles and process and they appreciate having access to someone who can provide direction on the process (someone knowledgeable on the subject from within the training and development section or a dedicated PDP co-ordinator). If you are at the stage of introducing PDPs to your organisation, it is also advisable that local level workshops on personal development planning are run on an as-needed basis to ensure full understanding of the process and the benefits of personal development planning.

- **Line manager support**
  Ideally, individual team members partaking in Personal Development Planning need to receive feedback from their line managers as part of their development. They should also discuss and agree their development plans with their manager. Line managers may thus require training in such areas as giving (and receiving) feedback, managing individuals' expectations, negotiation, building trust, conducting one-to-one meetings.

- **Time**
  One of the main reported areas of difficulty in completing the personal development plan is time. If team members are participating in this process, line managers and team members need to come to an arrangement over the time allowed to undertake the process. Line managers should introduce the notion of 'protected time' for the time required for one-to-one discussions relating to individual personal development. These discussions are likely to last one hour and should be during the working day of both manager and team member.

- **Resources**
  One of the likely outcomes from this process will be training and development for each participant. This requires both time and money. Prior to completion of the personal development plan, each participant should have a meaningful conversation with his/her manager regarding what is feasible.

FREQUENTLY ASKED QUESTIONS ABOUT PERSONAL DEVELOPMENT PLANNING

**Possible questions from staff members**

- What's in it for me as a staff member?
  Personal development planning gives you the opportunity to take an active role in your own learning and development. You decide what you need in order to develop and progress within your career. Using the personal development planning process, you can discuss and agree with your line manager access to the learning and development that gives you the best chance to advance your career and achieve your goals.

- What happens if I choose not to complete a personal development plan?
  Nothing. The personal development planning process is voluntary. It is hoped that, over time, more and more people will become involved, because the PDP is a good starting point for negotiating on individual learning and development.

- What happens if I don't trust my line manager?
  If you don't trust your line manager, you can still go ahead with your PDP. We would advise that you still discuss your PDP with your line manager in order to gain agreement for your development. However, you should concentrate on gathering feedback on your performance from a range of other sources including colleagues with whom you directly work, your peers and those who report to you. Asking for examples is a good way to validate the feedback you receive.

**Possible questions from line managers**

- Whose job is staff development?
  Everyone has a role to play in development. You have a role to play in your own development, and the development of those around you. Whether you are a manager, a colleague or a direct report, you can provide useful information about others. As a line manager you should partake in the development of the personal development plan for your team members.

- How am I as a line manager to make time for all this development work?
  Obviously no one wants learning and development to impact negatively on the quality of patient care. Chances are however, that you are already spending a good deal of time on staff learning and development, and all the personal development planning process will do is to provide you with a more structured way to discuss and decide on staff development.
If you have a large number of staff reporting into you, you may need to stagger the personal development discussions over the course of a few months. If the outcomes require off-the-job development, then you may need to consider the use of locums/agency staff to act as cover for staff.

**What support is available to me as a line manager in this new role?**
If you feel that you need support in this role, you should contact the PDP co-ordinator for your organisation who can give you advice, talk you through the process and provide you with details on relevant training. The Office for Health Management also has a website with useful information: http://elearning.tohm.ie

**Other possible questions**

- **Can all staff partake in personal development planning?**
  Yes (subject to it being available in your organisation), and choosing to participate is voluntary.

- **What if training doesn't happen due to budget constraints?**
  This may occur. If it does, you should try to think of alternate ways of receiving the same experience in a more cost-effective way. For instance job rotation/on-the-job coaching rather than attending a seminar.

**Possible questions at organisation level**

- **As an organisation, are we ready for personal development planning?**
  Not every organisation is currently fully ready, indeed it may take a number of years for the entire process to get off the ground.

- **Are we creating expectations which we cannot meet?**
  One of the reasons the process suggests that the individual meets with the line manager is so that this creation of false expectations does not occur. It is the role of the line manager to ensure that the personal development plans of their staff are realistic in relation to the training budget.

**How does personal development planning link to service planning?**
Currently there is no formal link between the two. However, individuals completing their PDP should be aware that they are more likely to receive development if they can link their needs to the service plan. In reviewing the PDP, line managers should also strive to ensure that individual PDPs are in line with the service plan.

**How does personal development planning differ to performance appraisal?**
The emphasis of personal development planning is on development only. It is done purely on a voluntarily basis and there is no link to financial reward.

**YOUR ROLE IN PERSONAL DEVELOPMENT PLANNING**
You can play a role in introducing the personal development planning process to the health service in Ireland. You can

- pilot personal development planning within your own organisation/your own department
- ensure that 'protected time' is allowed for implementing the process
- ensure that you attend the necessary training in order to feel comfortable with the process (such as training on giving and receiving feedback).
- act as a role model for other staff, particularly any staff whom you manage, by completing your own PDP.
FURTHER READING ON PERSONAL DEVELOPMENT PLANNING

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Dixon, Dr Maureen and Baker, Dr Alison (1996), A management development strategy for the health and personal social services in Ireland, The Department of Health, December.
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