

# P1 to P2 Individual Development Plan (IDP) Form

The IDP identifies the proficiencies necessary, the training and development activities that will be part of a P1 position, and documents progress toward meeting goals necessary to advance to the Professional-2 level.

Employee Name: Jamie Jones		Supervisor Name: Suzy Supervisor		Department: Finance.	
Current Title (P1): Financial Services Analyst 1		Probationary Status Ends: 1/15/2025		Readiness at the P2 level Demonstrated On: <a href="#">Click or tap to enter a date.</a>	
<p>P2 Level Proficiencies (Behavioral, Functional, Technical, etc.: <i>Demonstrates readiness at the P2 level.</i></p> <ol style="list-style-type: none"> <li>1. Ability to research and successfully resolve financial discrepancies.</li> <li>2. Ability to prepare financial reports including analysis and summaries of financial transactions for management's review, and for support of strategic decision-making.</li> <li>3. Ability to review transactions for regulatory compliance, identify issues, and recommend solutions.</li> <li>4. Able to participate in internal records audits, ensuring that internal controls are addressed, and able to resolve issues to protect University resources.</li> <li>5. Able to correctly interpret policy and advise on existing processes and practices.</li> </ol>					
Cmp (#)	Development Plan <small>List any work assignments and activities that support the development of skills, knowledge &amp; proficiencies required at the P2 level.</small>	Expected Outcome <small>Describe the successful completion of activities and how proficiency will be demonstrated.</small>	Req.-Pass Probation (Y/N)	Milestone Target Date	Achieved Date
1	Scheduled trainings with others in unit to review financial transactions against GL to learn internal resources, processes and practices.	Demonstrates solid understanding of financial processes and the ability to independently review transactions, identify issues, and either resolve or make appropriate recommendations to achieve resolution.	Yes	9/30/2024	Date
2	Completes online software report developer courses (12 hours)	Learns software reporting concepts and is able to demonstrate ability to generate queries and create and format required reports.	Yes	10/31/2024	Date
3	Scheduled trainings with others in unit to develop skills in custom reporting, analysis, and developing final reports that include analysis and recommendations.	Demonstrates ability to run reports, analyze data, prepare summaries, and make recommendations independently.	No	11/30/2024	Date
4	Scheduled trainings with manager on regulations and compliance; follow up by working with others in unit to understand issues and processes for resolving issues.	Demonstrates ability to independently review transactions for regulatory compliance, identify issues, and resolve or make recommendations	No	2/15/2025	Date

## P1 to P2 Individual Development Plan (IDP) Form

<b>5</b>	Participates in campus audit training (class offered annually).	Applies audit training concepts at fiscal close to pre-audit financial records and take corrective action.	No	4/30/2025	Date
<b>Resources:</b> List any resources that will be utilized to contribute to development activities.  Online software reporting training; annual audit training class; one-on-one training and mentoring with others in unit and Manager.		<b>Supervisor Notes:</b> Click or tap here to enter text.			
<b>Additional Information:</b> Regular meetings with the employee are necessary, with formal check points at the 3, 6, 9, 12 and 18 month marks, to assess performance and provide feedback.  For career P1 positions where the incumbent is serving a probationary period, prior to the 6 month mark the department should determine if the incumbent is meeting the training goals. If not, a consultation with Employee & Labor Relations regarding either extending the probationary period, or releasing the incumbent during probation, should be done.  For non-probationary career P1 positions, if the P2 training goals are not met within the designated time frame, the department should consult with Employee & Labor Relations regarding next steps.  <b><i>Completion of the training period does not trigger auto-reclassification to the P2 level. Departments must submit a request for reclassification through Job Builder and the effective date of any approved reclassification will be based upon the submission date of a complete request.</i></b>  Advancement to the P2-level is not guaranteed, but will be determined on a case by case basis during the reclassification review, based on factors including completion of the training goals, and demonstration of P2- level proficiencies.					
I acknowledge that I have read the information provided on this form:     <div style="display: flex; justify-content: space-between;"> <span><b>Employee Signature:</b></span> <span><b>Date:</b></span> </div>		<div style="display: flex; justify-content: space-between;"> <span><b>Supervisor Signature:</b></span> <span><b>Date:</b></span> </div>			

# P1 to P2 Individual Development Plan (IDP) Form

## Form Instructions:

**Employee Name, Department, Current Title (P1), and Probationary Status Ends** (date) fields are completed by the department at the time of hire.

**Readiness at the P2 level Demonstrated On** field should be completed on the date that all proficiencies to meet the P2 level have been demonstrated, and an action to reclassify the position into the new title has been submitted in OACIS.

**P2 Level Proficiencies: (Demonstrates readiness at the P2 level)** should clearly identify the main proficiencies and expectations of the role at the P2 level. *For Example, to meet the Research & Development Engineer 2 level, an incumbent is expected to “design and prepare engineering plans and specifications of moderate complexity for novel lab equipment and instruments with general supervision.*

For each required proficiency, there should be one or more corresponding **Development Activity** and **Expected Outcome**.

The **Development Activity** could be *“Works under the direct guidance of the supervisor to learn engineering principles and methods to design and prepare engineering plans and specifications.”*

The **Expected Outcome** could be *“The incumbent demonstrates working knowledge of engineering principles and methods, independently developing professional engineering designs and schema.”*

The **Required to Pass Probation Y/N** field indicates if this proficiency must be mastered prior to the end of the employees’ probationary period. If yes, the supervisor would need to work with Labor to either release the employee prior to the end of the probationary period or extend the probationary period, if these proficiency goals were not met within the defined time frame.

The **Milestone Target Date** is the anticipated date where the proficiency is to be achieved.

The **Achieved Date** is the actual date when the proficiency is achieved.

The **Resources** field is where any development and training resources may be listed. *E.g. online resources, trainings, conferences, workshops, etc.*

The **Supervisor Notes** are for any other notes or comments relevant to the IDP, such as reference to any other applicable materials like a training schedule or timeline.

The **Signature** lines should be signed at the time the employee is hired and the IDP and training plans are discussed.