To be completed by employees to identify, assess and plan to address development needs. Once drafted, use this document to consult with your direct manager to agree and implement development opportunities.

## **Employee details**

|  |  |
| --- | --- |
| Name | *Frankie* |
| Position | *Project Administrator* |
| Reporting manager | *<<You>>* |
| Date | *<<Today>>* |

## **Self-assessment**

Complete the following self-assessment in order to identify your strengths and weaknesses (opportunities). Address at least one personal and one professional goal in your self-assessment as linked to a development area for you.

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| --- | --- |
| Goal 1  What is your key objective, plan, activity? | *Resource management – ensuring the project stays within budget.* |
| Strengths  What was done well? | *I methodically collate all costings to report to finance using an excel spreadsheet. On a weekly basis I then log all costs (invoices) to be paid against the sheet, saving the relevant documentation in the appropriate folder for the accounts team. The team have appreciated the systematic approach to managing the budget/costs for the project.* |
| Weaknesses  What can be done better?  (Capture any skill and/ or knowledge gaps for development to achieve this goal.) | *Once the finance team receive these accounts, they need to assign them a code to allocate them to the correct project/cost centre which they update in the spreadsheet and add to any related document (invoice) filenames. I am not across this process so am unable to complete this final step for them.* |

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| Goal 2  What is your key objective, plan, activity? | *Acting as a Scout Leader outside of work I am providing scheduling support for the cubs, scouts and venturers. There are many activities across the group with many different organisers and timelines.* |
| Strengths  What was done well? | *I have created a new excel spreadsheet and collated all of this information in one place. This file is saved on the cloud so all parties can access it and search for the information they want. This single point and consistency in information presentation has been well received and appreciated by the group.* |
| Weaknesses  What can be done better?  (Capture any skill and/ or knowledge gaps for development to achieve this goal.) | *Currently it is a large spreadsheet with no functionality applied. People are able to use “Ctrl” + “F” to look for the information they want, however I believe there is significant filtering and reporting functionality available.* |

## **Development plan**

Capture the priority areas for improvement and identify appropriate development opportunities as raised in your self-assessment. Include a plan for implementation (how and when it will be achieved) and once actioned the date completed is to be added.

Address at least one personal and one professional area for development in your plan.

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| --- | --- | --- | --- |
| Area for development | Development opportunity | Plan to implement  (How and when will this be achieved?) | Date completed |
| *Process knowledge and application – Finance* | *Schedule a session with a finance representative to take me through the process/systems needed to perform this extra function.* | * *Identify the correct contact in Finance – next 2 days* * *Schedule a meeting to run through the systems and processes – within fortnight* * *Document the process for future training – within a week from the training session* * *Complete reflection to identify impact of new documentation – within two weeks from documentation completion* |  |
| *Excel spreadsheet reporting functionality* | *Attends excel spreadsheet training course.*  *Applied Education –*[*MS Excel skills*](https://www.appliededucation.edu.au/microsoft/microsoft-excel-advanced/) *– Online (immediate start) $195 for intro, intermediate and advanced course.* | * *Confirm budget approval – within a week* * *Book onto externally run MS Excel course – within 2 days of approval* * *Complete course over 4 week period.* * *Apply excel learning to work and personal spreadsheeting – immediately post-course completion* * *Complete reflection to identify impact of new excel skills– within two weeks from course completion* |  |

## **Approval**

Capture the required approval to proceed with plan to implement development opportunities as outlined above.

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| --- | --- |
| Manager name |  |
| **Manager title** |  |
| **Manager comments**  Outline any additional comments and/ or suggestions relating to the opportunities/ implementation plan above.  (Word range: 50-90 words) |  |
| **Manager signature** |  |
| **Date approved** |  |

## **Reflection**

Employees fill in this section once they have completed their development opportunities as a self-reflection to identify the key take aways and value add of the development opportunity.

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| --- | --- | --- | --- |
| Development opportunity undertaken | Development key deliverables or outcomes achieved  (What did the development teach you?) | Personal or professional implications  (Did this address the development need?) | Date of reflection |
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<<Add more lines as needed>>