

## Year-in-Review & IDP

### The Goal of an Individual Development Plan (IDP)

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Our goal is to give employees the opportunity to create and document a plan for their career at RAMP and beyond. Through discussing long and short-term goals, along with professional development, employees can have a greater impact on their future career path.

### How does it work?

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Both the employee and their supervisor will complete their respective sections of this IDP form, followed by an in-person, joint review. The purpose of the IDP process is two-fold - 1) review performance of the employee over the past 12 months based on the competencies identified for their role, and 2) develop commitments on which to focus over the next 12 months.

### Your Role in the IDP Process

1. Once you receive this form from your supervisor, you will need to complete the following parts, below:
  1. Career Issues Worksheet
  2. IDP - Reflection
  3. IDP - Commitments
2. You will send the completed parts, along with any additional documentation that may be needed to supplement this form, to your supervisor at least 24 hours prior to the scheduled Year-in-Review meeting.
3. Prepare for an open and honest conversation about the information in this form with your supervisor.
4. You will copy the finalized version of your IDP below into your current ROWE Results document to track progress.

### Your Supervisor's Role in the IDP Process

1. Set a date for a Year-in-Review conversation with each direct report.
2. Send a blank IDP form to each of your direct reports.
3. Complete the Supervisor Feedback portion of this form, sending the feedback to each direct report at least 24 hours prior to your scheduled Year-in-Review meeting.
4. During the Year-in-Review conversation, engage in a conversation about the information contained in this IDP form.
5. Acting as a mentor, coach, and resource, develop a game plan to help each of your reports achieve the agreed upon development opportunities as it relates to their position and/or personal growth goals.
6. Electronically submit the completed and signed Year-in-Review/IDP form to HR within 2 weeks of the meeting.

### IDP Process

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| <b>Step One</b>   | Your supervisor will send you an invitation to your Year-in-Review meeting at least 2 weeks prior to the meeting date. You will receive your IDP form at that time.  |
| <b>Step Two</b>   | You will complete your portions of the IDP form (see directions above) and send it to your supervisor at least 24 hours prior to the meeting date.   |
| <b>Step Three</b> | Your supervisor will complete their portion of the IDP form and send it to you at least 24 hours prior to the meeting date. (By sending the information to each other prior to the meeting, it will give both a chance to absorb the information and prepare for the Year-in-Review conversation.) |
| <b>Step Four</b>  | You and your supervisor will review the feedback provided by each of you at the meeting. Following the meeting, your supervisor will combine both of your comments into one form.  |
| <b>Step Five</b>  | Your supervisor will electronically submit the completed and signed Year-in-Review/IDP form to HR within 2 weeks of the meeting to be added to your Personnel File.  |
| <b>Step Six</b>   | You (the employee) will copy the finalized version of your IDP below into your current ROWE Results document to track progress.  |
| <b>Step Seven</b> | The IDP will be reviewed throughout the year to track progress and encourage any needed adjustments. Supervisors will work with each employee on appropriate timelines for their goals.  |

Employee Name	Veronica Lavo
Position	Administrative Manager
Supervisor	Mary Hence
Date IDP is approved	07/15/2025

## Career Interests Worksheet

**Check the box next to any statement(s) that you feel apply to your current work situation.**

<input type="checkbox"/>	You are new to your position (under 1 year) and must learn the basics to get up to speed and feel productive.
<input type="checkbox"/>	You have been in your job for a while and are striving for increased competence in general.
<input checked="" type="checkbox"/>	You need to improve your performance in certain areas of your job.
<input checked="" type="checkbox"/>	Your job duties have changed (or will change), requiring new skills or expertise on your part.
<input type="checkbox"/>	You want to prepare for a promotion or move to the next higher level of responsibility.
<input type="checkbox"/>	You don't see much of a future if you remain in your current job, but aren't sure of options.
<input type="checkbox"/>	You want to plan your retirement.
<input type="checkbox"/>	Other:

### Career Interests

#### Short Term Career Interests (1-2 years)

I will continue to build on leadership skills and improving to be a better/stronger leader. Learning to withstand more of the ins and outs of leadership and building on skills already in place. I currently have no interest in changing roles from current position.

#### Long Term Career Interests (3-5 years)

Within 3-5 years I would hope that I am able to balance my current role adding in more responsibilities that deal more with Finance to be most supportive of the role that they play within the organization.

I want to learn about specific skills and duties that I could take on and absorb into my role from the Finance team. This is in hopes to continue my learning and also to provide support to that team when needed.

## Individual Development Plan

### Reflection

#### What did you enjoy most about your position over the past year?

Growing in my role. I learned a lot regarding leadership and becoming more aware of all things that can come with being in a manager role. I really enjoyed helping support my staff as they were getting up and running individually as new employees. I liked having the knowledge and skills to assist them and help them be able to assist people and situations they may encounter.

I really enjoyed seeing them realize that they knew the resources and were successfully helping consumers on their own, seeing them build their own confidence. I try to be a very supportive manager when having difficult conversations with my staff. I do not like bringing negativity in the mix, rather the fact. I am hopeful that leading by example in this area will help our team remain strong and allow them to see the role they play as part of our success as an organization.

Creating a new way to track inventory within a spreadsheet that was already being used for similar tracking has been fun! It was nice to help improve a process and make work easier and more effective for others. I will say that the hardest part of this project was keeping track of our inventory that moves within our office buildings - and keeping it all up to date.

#### What did you find most frustrating in your position last year?

Being in charge of facilities for our two outer offices has been frustrating at times. Especially when 'fire drills' or emergency issues arise - which cannot be predicted. As a planner I like to address issues before they become urgent, so taking on the facilities for these to offices has been an adjustment for me. Similarly, I've had to learn how to handle unpredictable situations with my staff too - such as being sick and needing last minute office coverage. But I feel I have found ways to handle these situations well.

Another area of frustration is from office supply spending. I believe there is still room for growth and savings when it comes to purchasing and managing office supplies for all of our locations. I plan to continue monitoring the spending when my direct reports are ordering/requesting supplies that may not be needed. I've found this frustrating as I know there may be items one thinks we need, but it really is not necessary. Communication with the other facilities manager can be difficult at times too, I feel like I am possibly stepping on toes when asking questions related to their facility requests.

## Writing SMARTER Goals to Strengthen Your IDP

Using the "SMARTER" method when developing your commitments for the upcoming year will help to make the process easier and more effective by:

1. Helping the employee and supervisor to set specific and measurable goals with defined outcomes and deadlines.
2. Creating a tool that you and your supervisor can revisit throughout the year to look at accomplishments and opportunities to adjust goals based on business needs and changes.

Elements required for using a "SMARTER" Goal format.

**S: (specific)** - What specifically are you proposing (actions, opportunities, etc.)

**M: (measurable)** - How will you know when your goal is complete (i.e. what does "done" look like?)

**A: (actionable)** - Are there action verbs included (complete, attend, perform, manage, etc.)? The commitment should be written as an action statement rather than a desire or wish list.

**R: (relevant)** - Why is this commitment important? What benefit will be derived by you and/or RAMP?

**T: (timebound)** - Enter a realistic "target completion" date plan to create a deadline for the commitment.

**E: (evaluate)** – Evaluate on a regular basis to look at progress.

**R: (readjust)** – If needed, goals can be adjusted. Work with your manager to determine if a goal might need to be revised over time. Changes in circumstances like finances, industry changes, business disruptions or personnel shifts may cause you to change goals.

## Individual Development Plan

### Commitments

#### Professional Development Commitments for the coming year (use SMART Goal format for each) Minimum of 2 and Max of 5

Should include activities that enhance an employee's knowledge, skills, and abilities. This may include training, mentoring, attending conferences, or pursuing certifications. The goal is to help employees become more proficient in their current role and prepare them for future advancement.

<b>Specific Goal # 1:</b>	Continue to build on being a better leader to my team.
<b>Measurable:</b>	Find a training in Masterclass to share with my staff and review at an offsite team meeting, once completing the Radical Candor training by July 2026
<b>Action items:</b>	Audiobook: Leading with Vision: Bonnie Hagemann by December 2025
<b>Relevant to you/your position:</b>	Conversation with staff reverting to the shared vision and how their role fits and moves our organization forward, ensuring they know their importance.
<b>Target Completion Date:</b>	September 2026
<b>Specific Goal # 2:</b>	Learn more about Finance and how my team and I can provide support.
<b>Measurable:</b>	Over the next year, schedule shadows within finance to observe/identify areas to provide support Initiate shadowing plan, complete first shadowing session 8/19/25
<b>Action items:</b>	Audiobook: Finance for Non-Financial Managers by Gene Siciliano Class/Course: LinkedIn Learning- Finance Essentials for Non-Financial professionals
<b>Relevant to you/your position:</b>	Identify opportunities to support the Finance department on tasks that can be delegated.
<b>Target Completion Date:</b>	January 30, 2026 have meeting with Finance to discuss ways to collaborate and ensure support.
<b>Specific Goal # 3:</b>	I will increase my leadership skills in building trust, problem solving, and creative leadership.
<b>Measurable:</b>	I will complete the "Building Trust" training by January 2026. I will ask my team to complete the training by February 2026. As a team we will meet in person to complete some scenarios, at trust quiz and discuss how trust affects their work inside and outside of RAMP by end of March 2026.
<b>Action items:</b>	By the end of June 2026, I will complete the "Solving Modern Problems" training and determine how
<b>Relevant to you/your position:</b>	I can use what I learned.
<b>Target Completion Date:</b>	I will complete the "Creativity and Leadership" training. I will run a creative problem solving session with my team to tackle at least one challenge our team is facing by September 2026.
<b>Specific Goal # 4:</b>	
<b>Measurable:</b>	
<b>Action items:</b>	
<b>Relevant to you/your position:</b>	
<b>Target Completion Date:</b>	
<b>Specific Goal # 5:</b>	
<b>Measurable:</b>	
<b>Action items:</b>	
<b>Relevant to you/your position:</b>	
<b>Target Completion Date:</b>	

**Supervisor Feedback**

Highlights / Strengths / Accomplishments in the Prior Year

Over the past year, Veronica has demonstrated exceptional dedication, leadership, and initiative in her role. She currently supervises the Office Support Specialists, oversees facilities for two of our offices, manages reports, handles I&Rs, assists with IT-related needs, tracks equipment, and skillfully manages challenging consumer interactions.

While Veronica faced some challenges early on in her supervisory role, she met them head-on with patience, self-awareness, and determination. Through her consistent leadership, guidance, and support, she has rebuilt and developed a strong, high performing OSS team—one that is widely recognized as among the best RAMP has ever had. This growth and success have been noticed and appreciated by many throughout the organization.

Veronica is deeply respected and relied upon by both her staff and colleagues. She is always looking for ways to improve RAMP's operations, increase efficiency, and identify cost-saving opportunities—approaching each challenge with creativity and commitment.

Areas of Opportunity for Growth in the Upcoming Year

Veronica has made tremendous progress as a leader, and continuing to build confidence in her communication with peers will only strengthen her effectiveness. There have been a few occasions when peers have responded to emails in a not so pleasant manner, and I would like to see Veronica feel more confident in how she responds to these interactions - using a respectful yet straightforward approach that communicates how the message was perceived and how she would like to collaborate moving forward. Developing this level of assertive communication will further enhance her already strong professional relationships and reinforce her leadership presence across the organization.

Veronica consistently produces high-quality work and holds herself to very high standards, which is a real strength. At times, this can lead to spending more time than necessary on tasks that are already meeting expectations. Continuing to focus on prioritizing when "good and complete" is sufficient will help maximize efficiency while maintaining the strong quality of work you consistently deliver.

Expectations for the Upcoming Year

- Maintain strong leadership and continue developing the OSS team.
- Communicate confidently and respectfully with peers, sharing perspectives clearly.
- Prioritize self-care, use vacation time, and maintain work-life balance.
- Delegate effectively and trust the team to share responsibilities.
- Seek opportunities to improve processes, efficiency, and cost savings.
- Lead by example with commitment, dependability, and willingness to help.

I acknowledge that I have reviewed and discussed my Individual Development Plan with my supervisor and have agreed on commitments for the upcoming year.

**Employee Signature** \_\_\_\_\_ **Date** \_\_\_\_\_

**Supervisor Signature** \_\_\_\_\_ **Date** \_\_\_\_\_