JA Jessica Anderson

# Ethos - Job Aid: Learning Development Plan (LDP) - Create or Select a Plan (All Employees)

This job aid will provide step-by-step instruction on how to select an LDP plan template, create a learning development plan from scratch, and navigate active plans. Clear screenshots are included to help guide each step. Best practices are listed within the content of this training. By the end of this job aid, Employees will have all the tools available to properly select LDP templates or create a plan to meet their needs for the performance year.

Select a Plan Template

Create a Plan From Scratch

Navigating Active Plans

Select a Plan Template
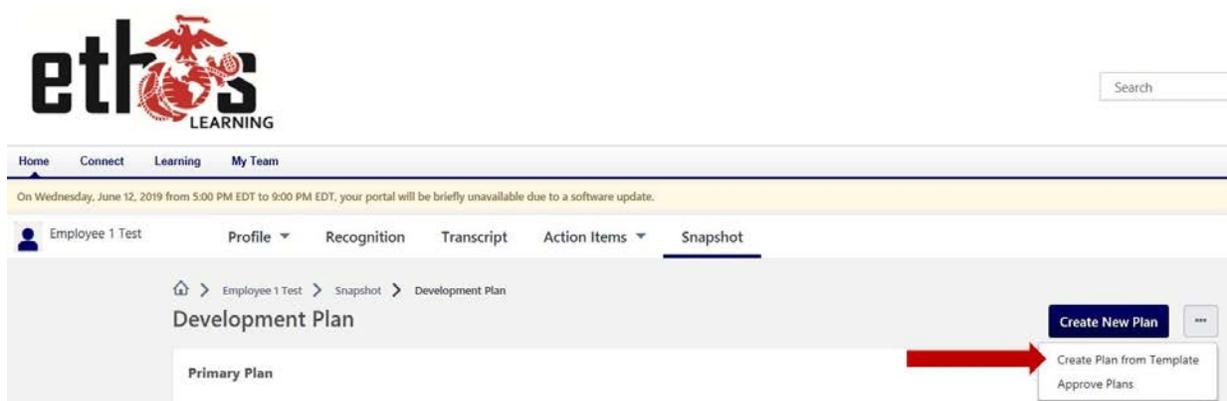
JA Jessica Anderson

- **Login** to Ethos.

- Hover over the **Learning** Tab and click **Learning Development Plans** from the drop-down menu.

- Click on the **ellipsis** (box with 3 dots), to the right of "Create New Plan".
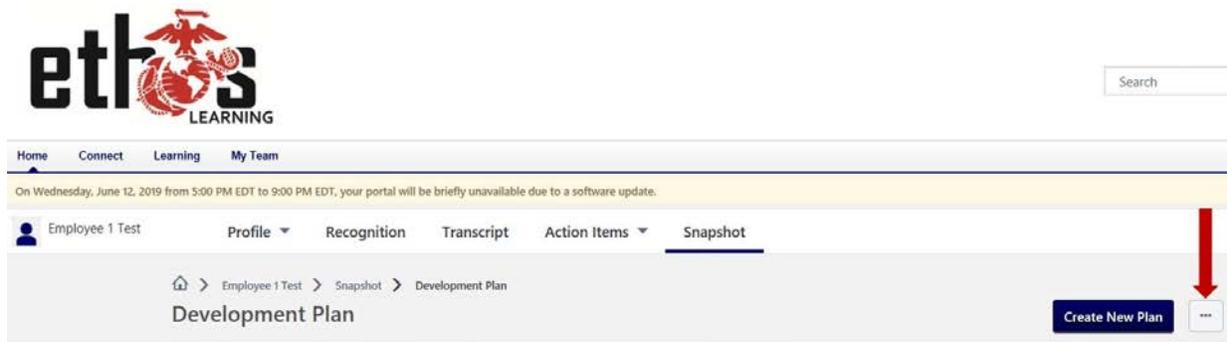
Click ellipsis (box with 3 dots) to the right of "Create New Plan".

1

- Select the **Create Plan from Template** option (as seen in screenshot below).

Select the Create Plan from Template option.

- **Search** for a part of the title for the appropriate LDP Template to be used (e.g. Retail Position, CYP Position, etc.), or scroll through to see all options.

- There is an option to **Preview** the plan (i.e., is this plan a good start to edit).

- There is an option to **Apply Template** to select the desired plan for use.

Search for a plan, **Preview** plans, and **Apply Template** to use a plan.

BEST PRACTICE

How to **determine** the plan template to **use**:

- **Preview** plan to determine if it is the **best fit** for employee **use**
  - **Cancel** if the plan being previewed **does not meet** the employee's **needs**
  - **Apply** if the plan is the **best fit** or can **be modified** to meet employee needs

The following process outlines how to adjust the selected plan to meet the employee's needs specifically.

How to Edit Selected Plan Template

On the LDP Create a Plan Page you will have multiple steps to complete in order to prepare an individualized plan.

Learning Development Plans are minimally required to have one Objective with one Training item to meet the goal of said Objective. There is no maximum limit.

When ready click START.

Begin Editing Template

1. Begin by changing the title of the plan to **the Employee's Name & Performance/FY#### (year)**.

2. The Category is **Position Specific**.

3. **Description** can be changed to describe the plan being developed.

Edit Each Objective Section

Training Objectives are to be **narrowed down and edited** as necessary.

- Select the **Pencil Icon** to the right of each Objective box on the LDP to view **editing options** within each section.

- Select the **"X" Icon** to the right of an Objective box on the LDP to **delete the whole Objective section** if it is determined **not needed** at this time.

Edit Training Items Within Each Objective Section

Edit Development Objective

1. Begin by changing the Objective Title to generally reflect a development idea, goal or topic area.

2. The category should be "Performance Goal"

Learning and Development

Training items already listed on the template **can be** added to, edited, or deleted.

- **Search for Learning** to add training from the Ethos Course Catalog

- **Add Development Action** to add training outside of Ethos

- Select the **Pencil Icon** to the right of the training for editing

- Select the **"X" icon** to the right of the training to be deleted

Search for Learning

There are three basic steps to Search for Learning found within the Ethos Catalog.

1. Use the **Search Box** to find training by **key word**: i.e. Time Management, Communication, Leadership, etc.

2. **Filter** by Type, Subject, or Duration (optional).

3. Review results to **find course(s)** to **Add to the Objective**, Goal, or Topic area being developed.

   a. Click **Add to Objective** below the training title, to add the course to the LDP objective section.

   b. If there are multiple courses to add, click "**Add to Objective**" for each one seen on the page.

   c. If a selected **course is no longer wanted** on the plan, click **Remove from Objective**-below the training title-when on the Search for Learning page.

   d. To see the **course description**, **click the title** of the training.

Close Search for Learning

Discard Selections   Return to Objective

At the bottom of the search window there are two options:

- **Discard Selections** – to undo all selections and return to the Objective.

- **Return to Objective** – saves all selections and returns to the Objective.

Add Development Action

Development Action

Description*

Activity Type

Performance Task ▾

Due Date*

9/12/2019 📅

Progress

0

Development Actions can be anything an employee is going to do to support a goal outside of Ethos. For example, External Training, Job Shadowing, Coaching, Mentoring, Reading Materials, Certification, etc.

- **Description** – share/describe what action will be taken to further develop the goal.

- **Activity Type** – a drop-down menu to select a category that best reflects the description.

- **Due Date** – defaults to 90 days from the time of creating the Development Action. Edit as necessary.

- **Progress** – starts at 0 (zero) and is updated throughout the performance period until complete at 100.

Close Development Action

Cancel   Done

At the bottom of the Add Development Action window there are two options:

- **Cancel** – delete changes and return to the Objective.

- **Done** – save changes and return to the Objective.

Edit All Due Dates

Edit all due dates for each training item remaining **within each Objective section** on the LDP.

- All due dates for each training item **default to 90 days** from the day you access this plan.

- Change the **due dates** for each training to be **spread throughout the year** or **due at the end** of the Performance Year.

If a training **item needs to be removed** from the list, **use the "X" Icon** to the right of the training item to be deleted.

Complete Objective Section Edits

Discard Changes		Save and Add Another	Save and Return to Plan

As each Objective section is edited, the following options are available at the end of the Development Objective page:

- **Discard Changes** – Used when the employee decides **not to execute the changes** made (similar to "Undo" for all changes made).

- **Save and Add Another** – Used when the employee wants to **save current changes** and **add an additional Objective** section (for another goal/topic).

- **Save and Return to Plan** – Used when employee wants to **save current changes** and **return to the full plan view**.

Next Steps

Once **all changes** to the **training items** listed and **due dates** have been **adjusted**, the **Assignment Process can begin**.

🔒   Complete the content above before moving on.

4

- Once the **Plan** has been **edited** completely, and the user has selected **Save and Return to Plan**.

- Scroll down the LDP page to the **Assignment Section.**

- There is one radio button: **Self Only**. Self Only is the **default** selection.

Assignment

Select the criteria that defines who will be included in this assignment

🔘 Self Only

☐ Designate this as the Primary Plan for assignees

Discard Changes   Save as Draft   Submit Plan

Employee View of Assignment Section.

5

Employee Choice

In this step employees have an opportunity to designate this LDP as their Primary Plan.

- **Check** the **box** to designate as **Primary**
- Leave the **box blank** to **NOT** designate as **Primary**

6

- At the very bottom of the page there are buttons for: Discard Changes, Save as Draft, and Submit Plan.

- <u>Discard Changes</u> will cancel out every adjustment made to the LDP Template.

- <u>Save as Draft</u> will save changes, so further edits can be done later. The draft is found in the list that appears immediately upon selecting Learning Development Plans from the Learning Drop-down.

- <u>Submit Plan</u> will save the plan as changed and request the supervisor approve or deny the plan.



The Final Step

7

- For questions or further assistance contact the Headquarters Ethos Help Desk:

- EthosLMS@usmc-mccs.org

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The following is a visual demonstration outlining how to select a Plan Template using the steps above.

- There is no narration with either video.
- The video provides the "mouse clicks" as outlined in this job aid.

Visual Demonstration-Select an LDP Template
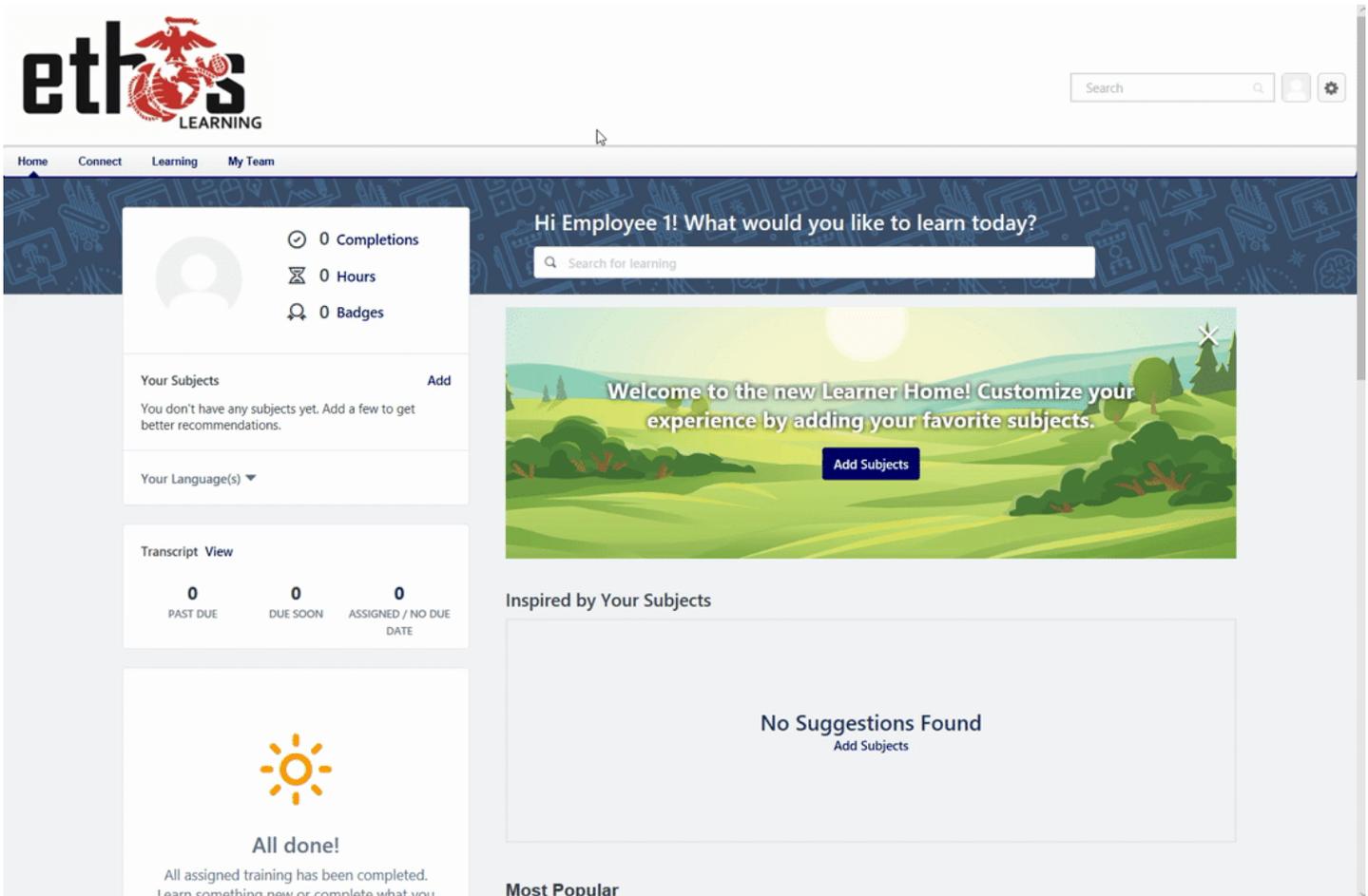
Summary

Following the **steps** outlined in this job aid are **critical** to **selecting** Learning Development Plan Templates **correctly**.

<u>**Always:**</u>

- Create a draft of your performance goals first
- Find the template that best fits the employee/position, based on those goals
- Make changes after visiting with your supervisor
- Edit where necessary (delete extra training items, or add training items)
- Adjust the Due Dates for each training item listed in each objective section
- Reach out to the Headquarters Ethos Help Desk as needed:
    - EthosLMS@usmc-mccs.org

Create a Plan From Scratch

JA Jessica Anderson

- **Login** to Ethos.

- Hover over the **Learning** Tab and click **Learning Development Plans** from the drop-down menu.

- Click on **Create New Plan.**
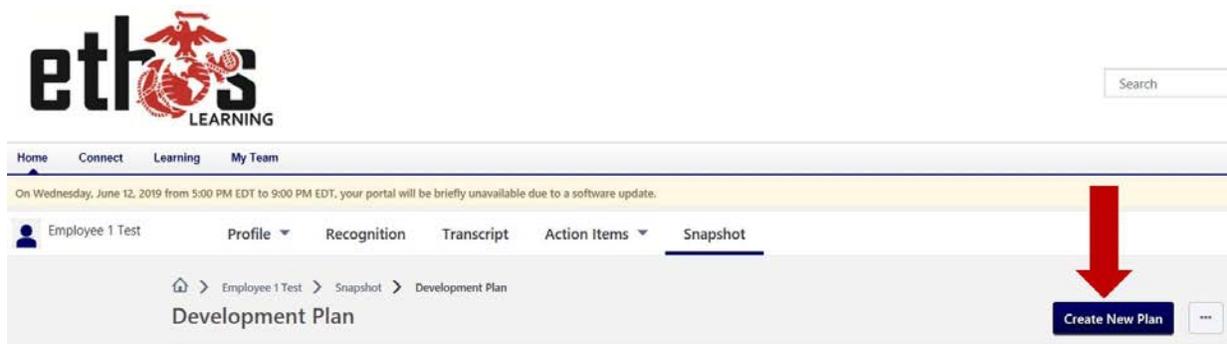
1

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1 Begin by adding a **Plan Title**: **Employee Name and Performance Year** (or FY ####)

2 The **Category** is **Position Specific**.

3 Add a **Description**: i.e., "This learning development plan will support my performance goals for #### (year)."

Create a Plan

Define your development plan by adding objectives and action steps

General Information

Plan Title*

| Include the name of your plan here | (1) |

Category

| Position Specific ▼ | (2) |

Description

| B *I* S̶ U̲ *I*ₓ H1 H2 H3 H4 H5 H6 | ≔ ⁞≔ | ⊶ ⌫ | ▦ 🖼 | ↩ ↪ | ⤢ |

(3)

- **Development Objectives** Section

- Select the **Add Objective** button

- There **must** be **at least one** Objective on the Learning Development Plan.

Development Objectives

There are no development objectives. Would
you like to add one?

[Add Objective]

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1   **Objective Title**: a **general phrase** to share the **goal/topic** being **developed** (i.e., Time Management Skills).

2   The **Category** is typically **Performance Goal**.

3   **Learning and Development** provides two options for **adding training** to support the stated Objective: **Search for Learning** and **Add Development Action** (further outlined in next steps).

Add Development Objective
Development Objectives represent what you need to learn or do in order to complete your development plan.

Objective Title

What skills would you like to develop?   ①

Category

Developmental   ②

Learning and Development

③

| Search For Learning | Add Development Action |

Find learning opportunities to help you achieve your objective.

Create your own actions to make your objective happen.

ⓘ   **NOTE:** Each objective must have at least one Learning and Development item. There is no maximum.

4

| SEARCH FOR LEARNING | CLOSE SEARCH FOR LEARNING | ADD DEVELOPMENT ACTION | CLOSE DEVELOPMEN |

There are three basic steps to Search for Learning found within the Ethos Catalog.

1. Use the **Search Box** to find training by **key word**: i.e. Time Management, Communication, Leadership, etc.

2. **Filter** by Type, Subject, or Duration (optional).

3. Review results to **find course(s)** to **Add to the Objective**, Goal, or Topic area being developed.

   a. Click "**Add to Objective**" below the training title, to add the course to the LDP objective section.

   b. If there are multiple courses to add, click "**Add to Objective**" for each one seen on the page.

   c. If a selected course is **no longer wanted** on the plan, click "**Remove from Objective**"–below the training title–when on the Search for Learning page.

   d. To see the **course description**, **click the title** of the training.

Add Learning to New Objective

	SEARCH FOR LEARNING	CLOSE SEARCH FOR LEARNING	ADD DEVELOPMENT ACTION	CLOSE DEVELOPMEN

At the bottom of the search window there are two options:

- **Discard Selections** – to undo all selections and return to the Objective.
- **Return to Objective** – saves all selections and returns to the Objective.

SEARCH FOR LEARNING	CLOSE SEARCH FOR LEARNING	ADD DEVELOPMENT ACTION	CLOSE DEVELOPMEN

Development Actions can be anything an employee is going to do to support a goal outside of Ethos. For example, External Training, Job Shadowing, Coaching, Mentoring, Reading Materials, Certification, etc.

- **Description** – share/describe what action will be taken to further develop the goal.
- **Activity Type** – a drop-down menu to select a category that best reflects the description.
- **Due Date** – defaults to 90 days from the time of creating the Development Action. Edit as necessary.
- **Progress** – starts at 0 (zero) and is updated throughout the performance period until complete at 100.

Development Action

Description*

Activity Type

Performance Task ▾

Due Date*

9/12/2019 📅

Progress

0

SEARCH FOR LEARNING	CLOSE SEARCH FOR LEARNING	ADD DEVELOPMENT ACTION	CLOSE DEVELOPMEN

At the bottom of the Add Development Action window there are two options:

- **Cancel** – delete changes and return to the Objective.
- **Done** – save changes and return to the Objective.

Cancel   Done

🔒   Complete the content above before moving on.

5

Edit all due dates for each training item **listed for the Objective Section**.

- All due dates for each training **default to 90 days** from the day the plan is created.
- Change the **due dates** for each training to be **spread throughout the year** or **due at the end** of the Performance Year.

If a training **item needs to be removed** from the list, **use the "X" Icon** to the right of the training item to be deleted.

Add Development Objective
Development Objectives represent what you need to learn or do in order to complete your development plan.

Objective Title

Time Management Skills

Category

Performance Goal ▾

Learning and Development

| Search For Learning | Add Development Action |

Find learning opportunities to help you achieve your objective.

Create your own actions to make your objective happen.

	Time Management Basics	Learning Type: **Online Class** Due Date:	9/12/2019 📅	✕
	Make Meetings Work & Tackle Time Management Troubles	Learning Type: **Online Class** Due Date:	9/12/2019 📅	✕
	Learn Time Management, Get Organized & Get Everything Done	Learning Type: **Online Class** Due Date:	9/12/2019 📅	✕

| Discard Changes | | Save and Add Another | Save and Return to Plan |

Finalizing this Objective Section, then determine if another section is necessary or to return to the Plan.

6

As each Objective section is created per the process outlined above, the following options are available at the end of the Development Objective page:

- **Discard Changes** – Used when the employee decides to **completely delete** this Objective section of the plan.
- **Save and Add Another** – Used when the employee wants to **save the current Objective** development and **add an additional Objective section** (for another goal/topic).
- **Save and Return to Plan** – Used when the employee is **finished building** this Objective Section and wants to **return to the full plan view**.

| Discard Changes | | Save and Add Another | Save and Return to Plan |

Options at the bottom of the Objective Section when creating.

- Once the **Plan** has been **created**, and the user has selected **Save and Return to Plan**

- Scroll down the LDP page to the **Assignment Section**.

- There is one radio button: **Self Only**. This is the default selection.

Assignment

Select the criteria that defines who will be included in this assignment

- ◉ Self Only

☐ Designate this as the Primary Plan for assignees

Discard Changes   Save as Draft   Submit Plan

☑ Designate this as the Primary Plan for assignees

Employee Choice

In this step employees have an opportunity to designate this LDP as their Primary Plan.

- **Check** the **Box** to designate as **Primary**
- Leave the **box blank** to **NOT** designate as **Primary**

- At the very bottom of the page there are buttons for: Discard Changes, Save as Draft, and Submit Plan.

- **Discard Changes** will completely delete the Development Plan just created.

- **Save as Draft** will save the information added, so further edits can be done later. The draft is found in the list that appears immediately upon selecting Learning Development Plans from the Learning drop-down.

- **Submit Plan** will save the plan as developed and request the supervisor approve or deny the plan.

☐ Designate this as the Primary Plan for assignees

| Discard Changes | Save as Draft | Submit Plan |

10

- For questions or further assistance, contact the Headquarters Ethos Help Desk:

- EthosLMS@usmc-mccs.org

11

The following is a visual demonstration on how to Create a Learning Development Plan from Scratch using the steps above.

- **There is no narration with the video.**
- **The video provides "mouse clicks" as outlined in this job aid.**

Visual Demonstration-Create an LDP from Scratch

Summary

Following the **steps** outlined in this job aid are **critical** to **creating** Learning development Plans **correctly**.

<u>**Always:**</u>

- Create a draft of your performance goals first.
- Create Objectives with Learning to support your goals for the year.
- Make changes after visiting with your supervisor.
- Adjust the Due Dates for each training item listed in each objective section.
- Reach out to the Headquarters Ethos Help Desk as needed:
  - EthosLMS@usmc-mccs.org

Navigating Active Plans

JA Jessica Anderson

This section will outline how to View, Edit, Print, Cancel, and Designate as Primary Plan for any learning development plan found on an employee's Development Plan page.

1

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1 **Login** to Ethos.

2 Hover over the **Learning Tab**, and click **Learning Development Plans** from the drop-down menu

3 Find **all created** Learning Development **Plans** listed **here**.

2

- The **Primary Plan** is listed **first** and separate from the Other Plans.

- To the far right of the primary plan is a **drop-down carrot**.

- The drop-down for the Primary Plan provides options to View, Edit, Cancel or Print.

> **Note:** The Cancel option will appear in this drop-down menu once the manager approves the submitted plan, upon being assigned a plan by the manager, or when the plan is in Draft status.

- All **Other Plans** are **listed below** the Primary Plan.

- To the far right of each plan is a **drop-down carrot**.

- The drop-down for all Other Plans provide options to View, Edit, Cancel, Designate As Primary Plan, and Print. .
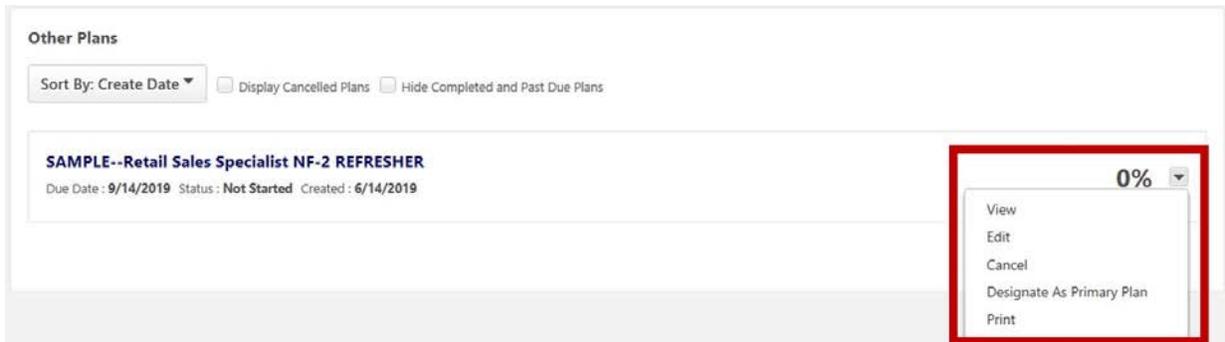
VIEW

Lets you view the Development Plan as a whole, update Development Action Progress, and Launch training.

This process will be outlined in detail in the next section.

EDIT

Lets you edit the Details, Development Actions, and Training part of the Development Plan.

As outlined when creating or selecting a plan template in previous chapters.

Lets you delete your plan.

CANCEL

If the plan is in any other status besides "Draft", then managers will need to approve the

cancellation.

DESIGNATE AS PRIMARY PLAN

Lets you set the plan as your Primary Plan.

PRINT

Lets you export your plan to print as PDF.
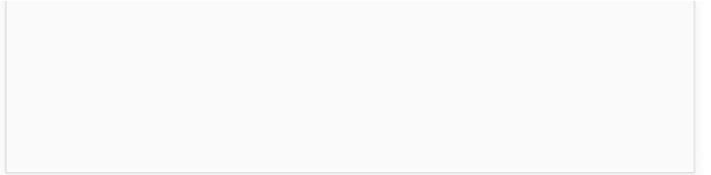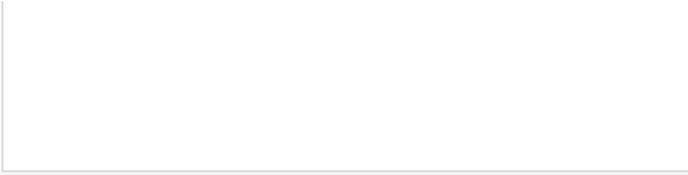
5

Options When Viewing An LDP

Introduction

This process will outline some best practices when viewing an LDP, and working through training to gain completion.

Initial View of Primary Plan
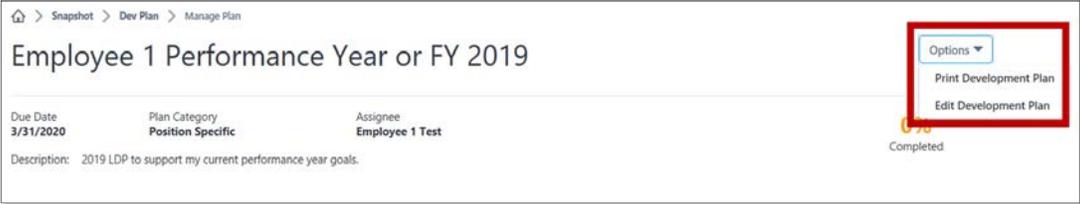
Displayed are the Title, Due Date (last due date found within plan), Plan Category, Assignee, Description, Completed Status by Percent, and Two Options.

- **Print** Development Plan

- **Edit** Development Plan

Development Objectives Section

Each **objective title** and **category** is listed with **associated training**, and a **place for comments**.

Users can request training directly from the LDP by clicking **Request**.

Request Training

When **Request** is **selected** for a training item, the user is **taken to the transcript** where the training is ready to **Launch** and work through to completion.

Upon completing this training item, it will automatically update to a completed status on the LDP.

Comments per Objective Section

Objective Comments

Add a Comment

Comments per Objective are **optional**; however when updating a Development Action, it is **highly recommended**.

Comments **ensure clear communication** about any changes or updates made to the specific Objective Sections of the LDP.

Sample Comment

Objective Comments

> **6/17/2019 started working on the first course in this section.**

Save   Cancel

Comments are meant to be **dialog between** the **employee and the manager** when reviewed periodically.

Updating Development Action Progress

Development Actions have **a progress bar** that can be **adjusted** periodically. Toggle the circle along the **0-100%** bar to share progress toward completion.

It is **highly recommended** to **add a comment** regarding changes to this type of training on an LPD.
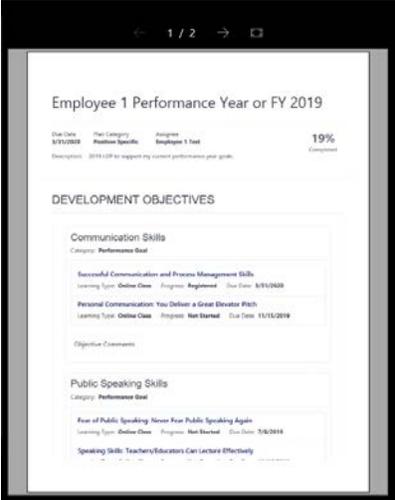
Plan Comments and Attachments

Plan Comments

Add a Comment

Attachments

Upload Attachment

Plan Comments – this is a place to provide an overall comment about the plan. Again, providing clarity and dialogue to the manager.

Attachments – upload documentation to support learning objectives or training items, as needed.

Print Plan

Pictured is a sample of **printing a plan** as PDF.

Summary

This process can be repeated as necessary to complete the entire plan.

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For Assistance Contact

Headquarters Ethos Help Desk at: EthosLMS@usmc-mccs.org