



Professional Development Plan Templates

User Guide

Resource | April 2026

Introduction

The [Institute for Home Visiting Workforce Development](#) has developed four Professional Development Plan (PD Plan) templates to support home visitors and their supervisors in developing clear and feasible professional development plans:

- One template for home visitors who are new to their roles (less than one year)
- One template for home visitors who are more experienced (in their roles more than one year)
- One template for supervisors who are new to their roles (less than two years)
- One template for supervisors who are more experienced (in their roles more than two years)

Effective PD Plans represent a collaborative partnership between the home visitor and their supervisor, and between the supervisor and their program administrators. When individuals collaborate across roles to reflect on their experiences, recognize strengths, and define learning goals, the result is a professional development pathway that is both intentional and supportive.

Thus, the process of developing a PD Plan is just as important as the plan itself, strengthening communication, trust, and shared commitment to high-quality home visiting.

The new PD Plan templates are designed to support this process. Specifically, they:

- Support reflective practice and professional growth; Guide and track professional development over time
- Support the integration of goal setting, training alignment, and lived experience into workforce development planning
- Encourage wellness strategies and supervisor input into the planning process

Purpose of this Guide

The PD Plan templates were created with the understanding that you, as a home visitor or supervisor, know best what you need from them. They are designed to be flexible and adaptable, and meant to be a starting point for ongoing discussion. Feel free to tailor them as needed to reflect your unique circumstances. The ideas shared here are only suggestions, meant to inspire your own professional development journey.



Using the PD Plan Template

Getting Ready

Taking time to prepare before completing the PD Plan templates will make the process more meaningful and useful. Here are a few recommendations to help you reflect on your skills, experiences and goals.

- **Take time to self-assess.** This is crucial to plan development because it boosts self-awareness, fosters a proactive approach to learning, and empowers you to take ownership of your growth and make informed decisions about your future. A plan based on genuine self-reflection is more likely to be effective, relevant, and lead to increased job satisfaction and career advancement.

Your organizations may use a preferred self-assessment tool. If not, choose one that works for you. One option is this [Pre-Assessment](#) from the Institute for the Advancement of Family Support Professionals. It's a free tool to assess your current knowledge of content areas prioritized by the [National Family Support Professional Competency Framework](#).

Before completing the PD templates, take time to reflect on your self-assessment and allow it to guide your reflections on the template.

- **Reflect, independently, on recent practice experiences.** Grounding your conversations in everyday practice will help to ensure that your PD Plan is both meaningful and relevant. Some experiences to reflect on might include:
 - A visit that felt especially strong. What contributed to that success?
 - A visit that felt challenging or stuck. What may have made it feel that way?
 - A moment when you felt particularly effective in your role, alongside a moment when additional tools, strategies, or support might have been helpful.

These individual reflections will help you identify strengths and areas for growth, creating a thoughtful starting point for your collaborative planning session.

- **Consider your professional well-being.** Growth is easier to maintain when we notice what gives us energy and what wears us out. So, take a little time to reflect



on what helps you feel motivated and engaged, what tends to feel draining, and what kinds of support help you do your best work in your practice.

Developing the PD Plan

The PD Plan templates are designed to be used by home visitors, in partnership with their supervisors; or by supervisors, in partnership with their administrator; to assess, reflect, and plan together for future professional growth.

There are five key steps involved in PD Plan development:

- **Step 1. Introduce the template.** Before launching into completion, it can be helpful to review the PD Plan so that everyone involved understands its purpose and sections. Team meetings can be effective spaces to promote peer-based learning about the templates and PD planning, more generally. Supervisors can review the template to ensure that everyone understands related expectations, processes, and deadlines. Home visitors can partner with one another to discuss their initial impressions of the template. This approach can promote engagement, buy-in, and peer support for PD planning.
- **Step 2. Complete each section.** Home visitors and supervisors (or supervisors and administrators) should work together to thoughtfully complete all sections of the template, deciding as a team which sections to complete independently and which to complete together. The process will take between one and three hours to complete—depending on how you choose to prepare, the amount of time spent on personal reflection, and the amount of time spent in conversation with peers and your supervisor.
- **Step 3. Develop goals and finalize.** Developing goals is where all the important reflection that you have done gets translated into concrete action steps. Appendix A provides guidance on developing SMART PD goals—that is, goals that are Specific, Measurable, Achievable, Realistic, and Timebound. It can be helpful to work closely with your supervisor to develop goals that are aligned with your organization’s missions and values, your role, and the skills you hope to develop. Goals should be reviewed confidentially with your supervisor prior to finalization.
- **Step 4. Reflect on your experience.** Note what was helpful or challenging when completing the PD Plan and consider what you might want to do differently during your next goal cycle.



- **Step 5. Revisit and revise.** Consider your PD Plan a living document that you will refer to throughout the year. At a minimum, review and revise it annually. But best practice suggests that you revisit your plan quarterly—to reflect on how your responses may have evolved and see whether changes are needed to your SMART goals (and to celebrate when they are met! Acknowledging accomplishments along the way can be a great motivator for continued success!) Some programs have required check points for goals; others may leave that decision up to the individual. But what is always true is that PD Plans that are reviewed regularly are most effective.

Using Your PD Plan

PD Plans are meant to be used. Here are some tips for doing so:

- Integrate regular template reviews into your reflective supervision sessions. The templates designate space to ongoing reflections and progress in the goal tracking section, but other sections can be revisited, as well.
- Be intentional about scheduling time to review goals monthly or quarterly. This will help hold space for this conversation.
- Have your completed template available during all scheduled supervisions.

Your PD Plan template offers an up-close-and personal glimpse into your workforce development journey. It provides concrete evidence of your commitment to mastering new skills and shows that you are invested in your career and proactive in your growth. It also provides. By documenting all that you have accomplished along this journey, it also provides important leverage when seeking advancement or new opportunities.



Appendix A: Developing SMART Goals

What are SMART Goals?

The PD Plan template includes space to create and track SMART goals. The SMART goal structure helps home visitors and supervisors create clarity, focus, and accountability for professional and personal growth.

SMART goals are:

- **Specific:** Clearly defines what you want to achieve
- **Measurable:** Establish criteria to track your progress and determine when you've achieved your objective
- **Achievable:** Is realist and can be accomplished
- **Relevant:** Ensures that the goal matters to you and helps you reach your broader objective
- **Time-bound:** Have a clear deadline or identifiable timeframe

How do you create a SMART goal?

You can start by identifying a clear area of focus for your SMART goal. For example, is there a skill you want to develop or something specific you want to achieve?

Once you identify a focus, think about what success looks like and how you could measure that success. It might help to think about how your work connects with broader priorities, such as organizational goals.

What kinds of goals should you set?

When setting SMART goals, consider your current strengths, opportunities for growth, and the work that you do. Aim for goals that align with the core responsibilities in your job description, connect to what matters to you personally and professionally, and support broader organizational priorities. This level of reflection will help to ensure that the goals you set will be relevant, and that you will be motivated to keep working on them. Also,



think about areas where strengthening skills or refining practice would have a clear impact on the families you serve.

What are some common challenges to making goals SMART?

Many people find that the most challenging part of creating a SMART goal is making it **measurable**. For example, the goal “improve family goal setting in my caseload” is too broad to be measurable—so how will you know and demonstrate that you have improved in that area? Here is one SMART alternative:

“By July 15, I will ensure that 100% of families on my caseload have at least one active, parent-driven family goal using a strengths-based approach. I will review and update goal progress with each family during monthly visits and document outcomes in the family file.”

This SMART goal is measurable because it identifies clearly identifiable milestones that the home visitor and supervisor can use to determine if progress is being made and if the goal has been achieved..

Another challenge is making sure the goal is ambitious but **achievable**. In the example above, the home visitor was very ambitious. To ensure that this goal is also achievable, should consider the current state of their families’ goal setting, their caseload size, and what supports or resources they might need to reach this goal. They can then work with their supervisor to ensure that both the date for goal completion (in this case, July 15) and the target (100% of families on their caseload) are realistic.

Finally, people sometime struggle with setting appropriate **timelines**. SMART goals can be set for any period of time, but setting a timeframe of one year or less can help to ensure that they are both achievable and relevant. When setting a timeline, consider the scale and complexity of the goal. Below is a helpful rule of thumb:

- **Short-Term Goals (1-3 months):** Ideal for specific skill-building, small projects, or habits you want to develop quickly.
Example: Completing a training or implementing a new communication practice
- **Medium-Term Goals (3-6 months):** Appropriate for deeper skill growth, multi-step projects, or changes that require practice and feedback cycles.
Example: Strengthening facilitation skills or improving a reoccurring process



- **Long-Term Goals (6-12 months):** Useful for, leadership growth, goals tied to annual performance cycles, or for broader developmental areas that may require multiple steps that need to be broken down into smaller goal components.

Example: Leading a major initiative or preparing for expanded responsibilities.

Regardless of timeline, it is helpful to check-in regularly with your supervisor to assess progress, identify challenges, and ensure that the goal (and timelines) still feels achievable and relevant.

Some SMART Goal Examples

- *Professional Development Goal:* I will complete documentation training within six months to increase accuracy with case notes. I will attend two courses and complete one certification to build the required skills.
- *Communication Goal:* I will attend a communication workshop and apply at least two communication techniques in weekly supervision over the next three months to enhance transparency and clarity.
- *Team Retention and Well-being:* As the team supervisor, I will implement peer-support check in opportunities at least twice monthly to create a 10% increase in staff reporting they feel supported at work, as measured by an annual staff wellness survey.



Acknowledgement

This project is supported by the Health Resources and Services Administration (HRSA) of the U.S. Department of Health and Human Services (HHS) under grant number: 1UU6MC50283-01-00, totaling \$4,499,239.00 with 0 percent financed with non-governmental sources.

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