

Developing Your Individual Action Plan – a tool for goal setting and annual evaluations

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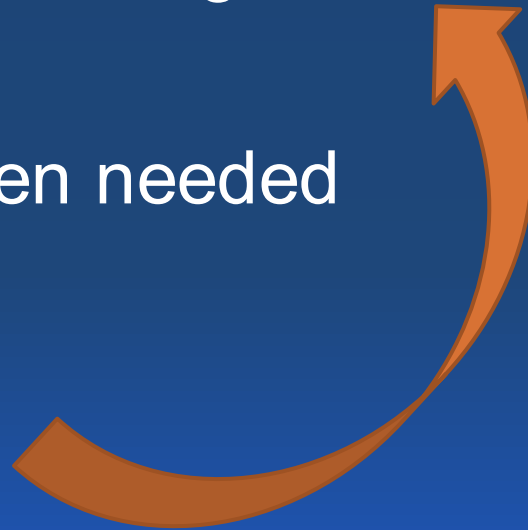


Objectives for Session

- Explain framework and concept of the Individual Development Plan/Individual Action Plan
- Describe the components of SMART goals
- Assess individual skills
- Practice setting short and long term goals for your IDP – with timelines
- Incorporate your IDP/IAP in your annual evaluation document and meeting

Career Success

- Set your course toward goals
- Stay on course
- Re-equilibrate when needed
- Achieve goals
- Set new goals





Value of deliberate career planning

- Body of literature to support value - people who develop and implement strategies to pursue career-specific goals
 - achieve greater career success as measured by salary, promotions, and level of responsibility.³
 - report greater career satisfaction and rate themselves as more successful than their peers compared to those without career plans.⁴
 - A nationwide study of 7600 postdoctoral researchers found that postdocs who developed training plans with their advisers at the start of their appointments reported greater satisfaction, published more papers, and experienced fewer conflicts with those advisers.⁵

Working Group of the Advisory Committee to the NIH Director, 2012

- Study of the future of the biomedical research workforce in the US Recommendations include: IDPs for all NIH-supported graduate students and/or postdoctoral researchers
 - To provide some structured training experience for all postdoctoral researchers
 - “NIH should require individual development plans (IDPs) for all NIH-supported postdoctoral researchers, whether on training grants, fellowships, or research project grants. Assessment of implementation of this requirement should be included in the review criteria of training grants. “

NIH Encourages Institutions to Develop Individual Development Plans for Graduate Students and Postdoctoral Researchers July 23, 2013 Notice

- *NIH encourages institutions to develop Individual Development Plans (IDPs) for graduate students and postdoctoral researchers (including scholars, trainees and fellows, and individuals in other postdoctoral positions) supported by NIH awards by October 2014. The IDPs should be broadly implemented for all graduate students and postdoctoral researchers supported by NIH.*

2013 Recommendations

Developed to:

- Attract and retain the best and most diverse scientists, engineers and physicians from around the world to conduct biomedical research as well as increase the number of domestic students from diverse backgrounds who excel in science and become a part of the STEM workforce.
- Prepare biomedical PhD students and postdoctoral researchers to participate in a broad-based and evolving economy.



What is an IDP

- The IDP is a written list of goals mapped to a timeline, and includes goal setting for research projects, skills development, and career planning.
- The IDP is to be written and developed by the individual, and is to serve as a framework for discussion between individual and supervisor/mentor.
- The IDP is only meaningful if individual and supervisor/mentor make full use of the IDP's potential as a career development tool.



The Individual Development Plan

- Used
 - To assess current skills, interests, and strengths
 - Make a plan for developing skills to meet academic and professional goals: and
 - Communicate with supervisors, advisors, and mentors about evolving goals, accomplishments and related skills
- It will be revisited again and again to update and refine as goals change or come into focus and to record progress and accomplishments



Preparing an IDP

1. Assess
2. Write
3. Discuss
4. Implement
5. Revise
6. Revisit



1. Assess

- Skills - get input (family, peers, mentors)
 - What are your strengths
 - What can you improve
 - What will you need for your future career
- Current Responsibilities
 - What are the milestones in your program or position
 - What are the expectations, degree requirements
 - Projects, scholarly articles, presentations
- Use a self-assessment tool and self-reflection



1. Assess

- What development activities are available in my current setting that could help me develop the skills and knowledge I need for my target job?
- Are there projects or experiences that could help my development?
- Are there formal learning opportunities I should participate in?



2. *Write* Exercise

- Complete the self assessment (Step I)
- Mark 1-5 for your current ability for each skill
- From the assessment, identify
 - Those in great need of improvement (1-3 rating) and
 - Those that are important for your job or your aspirations
- Then prioritize which 1-2 you will set as a goal for the year (short term); for 3 years and for 5 years

Assessment

Professional Skills:					
Grant writing skills	1	2	3	4	5
Oral presentation skills	1	2	3	4	5
Manuscript writing skills	1	2	3	4	5
Mentoring skills	1	2	3	4	5
Being a mentee	1	2	3	4	5
Approaching difficult conversations	1	2	3	4	5



2. Write

Assessment Summary

- 1 year: Improve ability to - conduct difficult conversations; write manuscripts; complete projects before deadline
- 3 years: Develop new clinical program; engage in team research projects; publish manuscripts
- 5 years: Lead team projects; secure extramural funding; get promoted

Examples



Setting goals

- Short term and long term
 - **SMARTeR** framework for goals:
 - S – specific (clear, easily understood)
 - M = Measureable (can be quantified, number, time, cost, etc.)
 - A = Attainable (within your ability and resources)
 - R = Realistic (within reach)
 - T = Time bound (can be accomplished within a given cycle)
 - eR = Reassess (adjust goals at least annually)

Making it SMART

- *Example: Scientific abstract submission for Fall meeting*
 1. Complete data analysis by August 1
 2. Draft results and graphs by August 10
 3. Prepare abstract by August 15
 4. Review with Mentor, co-authors by August 25
 5. Deadline for submission September 1

Making it SMART

- *Example: Submit training/funding application*
 1. Review all sources by August 1
 - Foundations
 - NIH, NSF, VA, etc.
 - Faculty and student suggestions
 2. Attend grant writing workshop, Fall
 3. Develop proposal by end of fall workshop
 4. Review with Mentor, external review, December
 5. Deadline for submission January 15

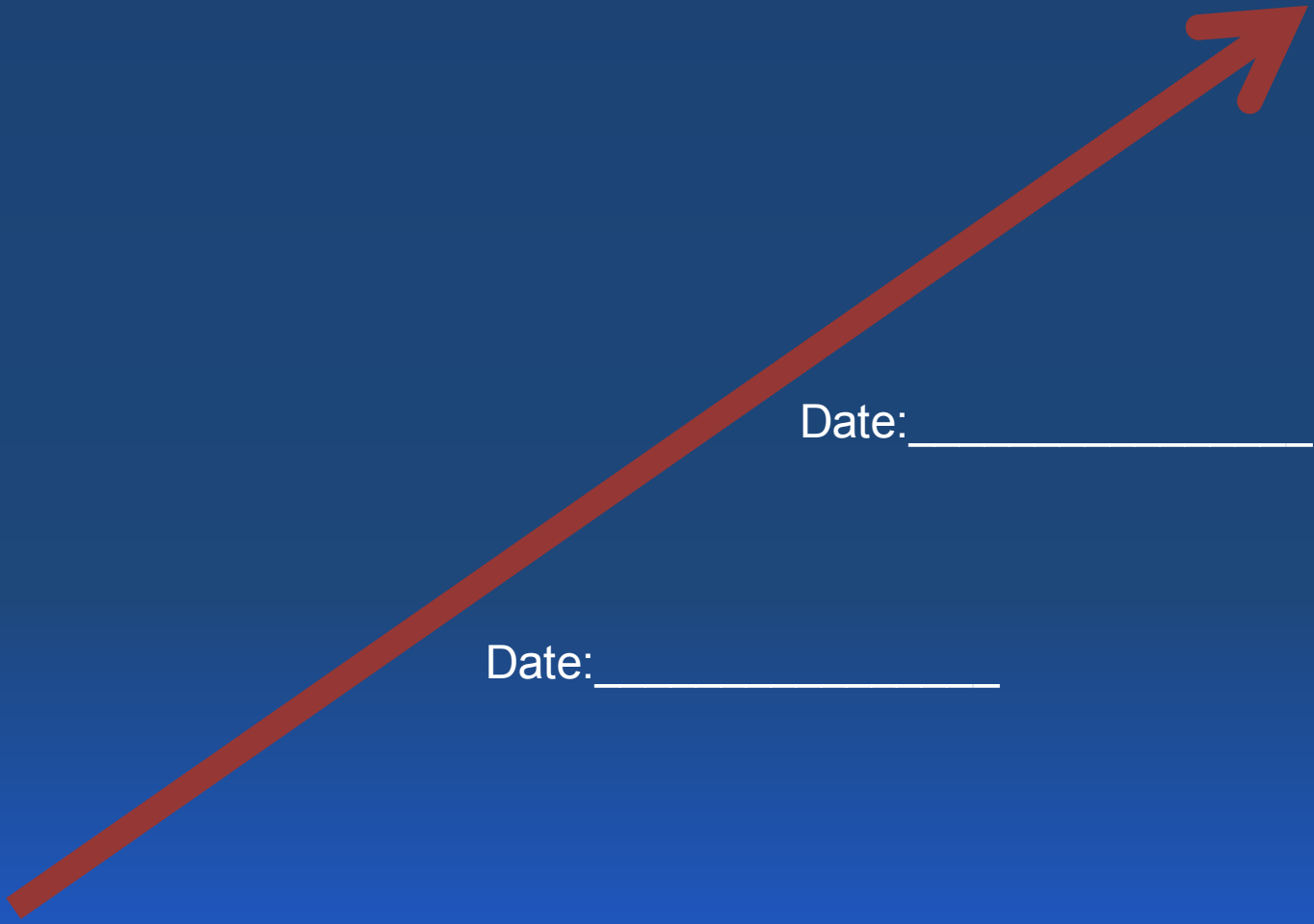
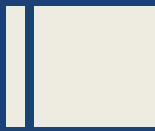
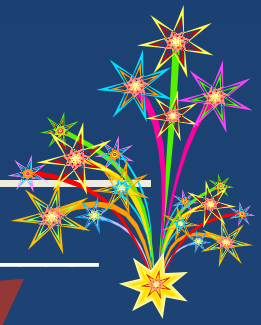


Overall Goals (longer term)

- Consider career interests
 - What type of work would you like to do
 - What is important in your post-training career
 - What will you do to achieve your career goals
- Expand your professional networks

Goal for 1 year: _____

Celebration date: _____



Date: _____

Date: _____

Today's date: _____

Write: Short Term goals (1 year)

1. Objectives or skills to be learned	2. Approaches and Strategies	3. Timeframe	4. Outcomes
Example: Improve my one-on-one teaching	Teach undergraduate student a research method	Begin July 15, complete by September 30	Undergraduate student is able to perform technique unaided

Write: Short Term goals (1 year)

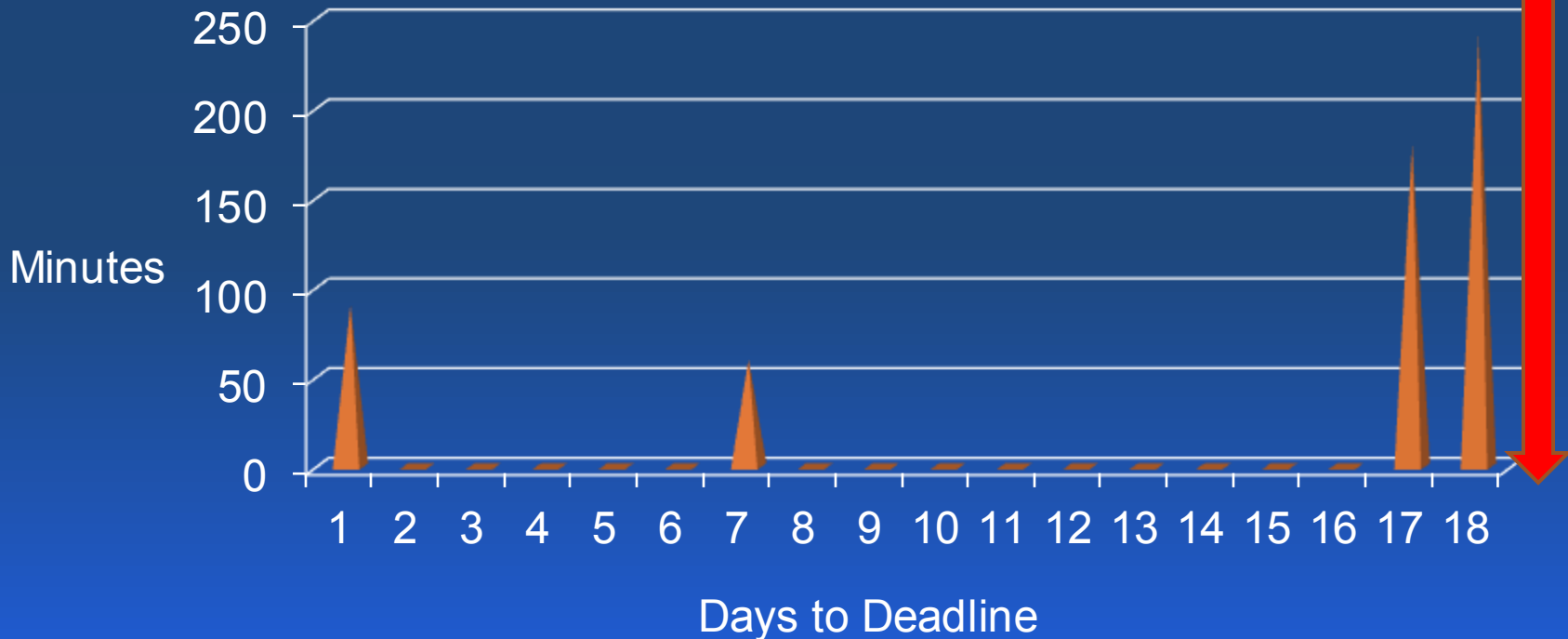
1. Objectives or skills to be learned	2. Approaches and Strategies	3. Timeframe	4. Outcomes
Example: Improve my one-on-one teaching	Teach undergraduate student a research method	Begin July 15, complete by September 30	Undergraduate student is able to perform technique unaided
Write manuscript from recent project	Draft outline. Complete methods, then results, then introduction and discussion. Last do abstract	Start July 1 Work 30 min per day First draft to Mentor by September 1 Revisions by September 30	Submit to journal XX by October 15.

About writing – The Writing Cycle



Deadline

Binge Writing





Binge writing

- Common, probably usual practice
- Deadline is met, but quality may not be your best

Writing Cycle

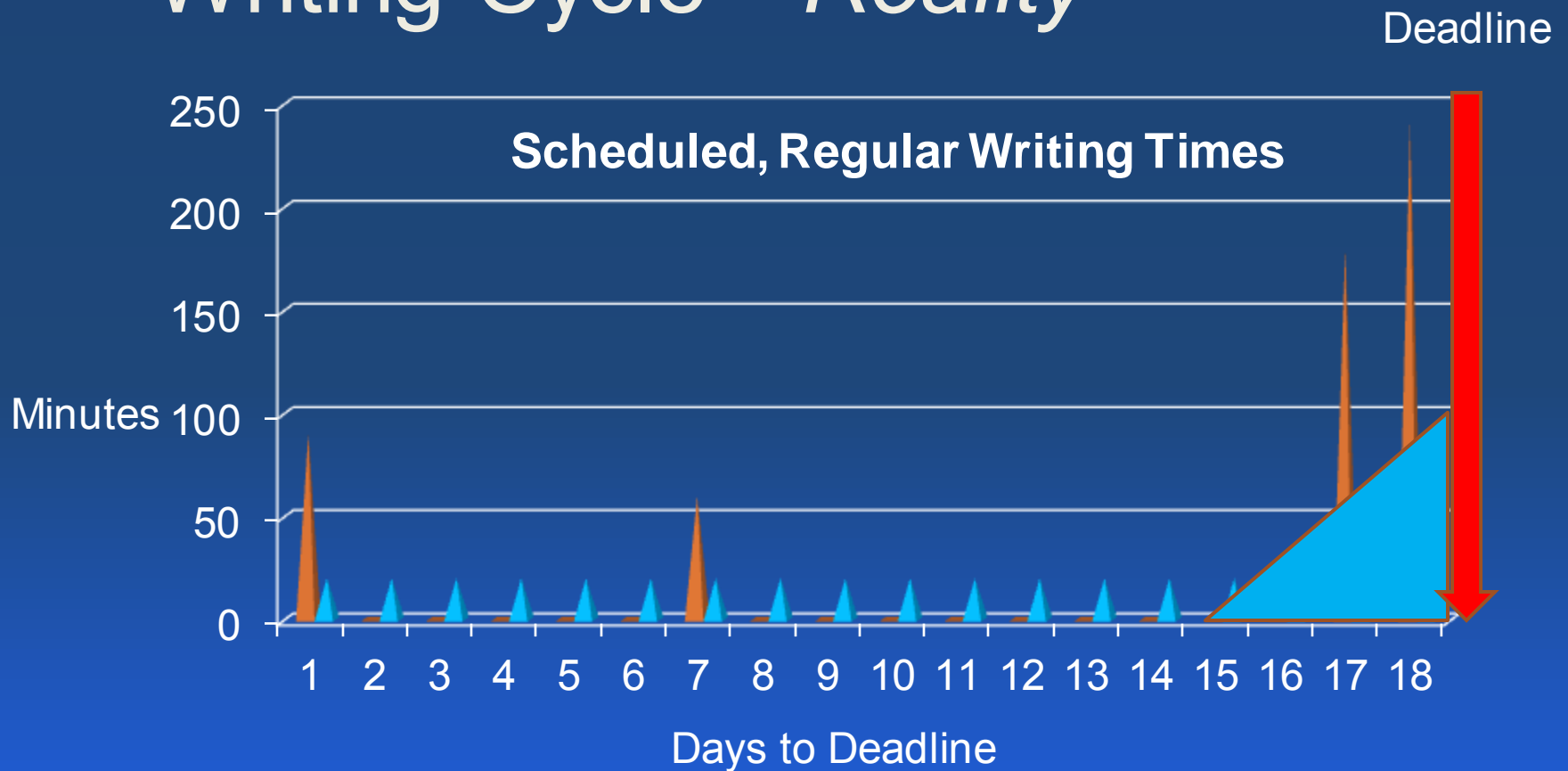





Regular (daily) writing

- 20-30 min protected blocks
- Will take the same total amount of time
- But with less stress and angst

Writing Cycle - *Reality*





Reality of deadlines – even when you use regular writing times

- Still have last minute issues
- But this will be for editing, not first draft
- Final product will be much improved



Implement your plan

- Be sure each sub-goal and goal have anticipated completion dates
- Act
- Review in 1-2 months, check off completed elements
- Revise and modify as needed
- Do a comprehensive assessment every year, prepare a new plan, incorporate into your annual self-assessment, and discuss with your mentor/advisor/chief at your annual meeting

Exercise – *(5-7 min)*

- Use sample Goal Setting page to list
 - 1-2 short term goals
 - 1-2 longer term goals
 - Include:
 1. Objective or skill to be learned
 2. Approach and strategies
 3. Who will be able to help (if you don't know – good place to start!)
 4. Specific time frame
 5. Outcomes



What does the IDP look like?

- Format – aids in development and progress assessment
- Cover/Headers
 - Name
 - Position
 - Date of entry (e.g. post doc, KL2 appt, training program, etc.)
 - Mentor(s)
- Common elements




Short term goals (1 year)

1.

- Action plan to achieve.....
- Expected outcome

2.

- Action plan to achieve.....
- Expected outcome



Long term goals (3-5 years – but decide which!)

1.

- Action plan to achieve.....
- Expected outcome

2.

- Action plan to achieve.....
- Expected outcome

3. *Discuss*

Mentor(s)

- Discuss expectations and goals
- Help to establish priorities
- Determine how feasible
- Identify ways the mentor can help
- Seek additional input as your IDP is revised and refined
- Agree when to meet midway to identify progress, challenges, barriers
- Review, report progress and revise the IDP after each year until long term goal is reached



3. *Discuss*

- Be sure to review with your spouse/family
- What make sense for short and long term goals



Tips for sharing with mentor(s)

- Give a heads up, set a meeting time
- Explain the process (send draft early)
 - Establish that this process is important to you
 - If funded trainee: remind that this is NIH/CTSI/UF policy
- Choose which goals to share with which mentor/advisor



4. *Implement* your plan

- Once finalized based on input, act.
- Look at the plan frequently
- Brainstorm strategies, systems and motivators that will work for you
- Use it as a roadmap – check your position frequently



5. Revise your IAP

- Every 6 months, update your goals
- **Celebrate your accomplishments!**
- Use the IDP as your progress report and roadmap for the next period

MyIDP

<http://myidp.sciencecareers.org/>



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You have put a lot of time and effort into pursuing your PhD degree. Now it's time to focus on how to leverage your expertise into a satisfying and productive career. An individual development plan (IDP) helps you explore career possibilities and set goals to follow the career path that fits you best.

myIDP provides:

- Exercises to help you examine your skills, interests, and values
- A list of 20 scientific career paths with a prediction of which ones best fit your skills and interests
- A tool for setting strategic goals for the coming year, with optional reminders to keep you on track
- Articles and resources to guide you through the process

There is no charge to use this site and we encourage you to return as often as you wish. To learn more about the value of IDPs for scientists, read the first article in our myIDP series.

Click below to get started.

[First Time Here?](#)

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Federation of American Societies
in Experimental Biology

MyIDP

- Collaboration of: Burroughs Wellcome Fund, UCSF, Medical College of Wisconsin, Federation of American Sciences for Experimental Biology (FASEB)
 - Stepwise entry and tracking of your entries
 - Able to pull up and revise online
 - Designed for late ***graduate students and postdocs***
 - Also contains a job search section



MyIDP process

1. evaluate your own skills, values, and interests.
2. use this self-assessment as a guide for exploring and evaluating career opportunities in your field and, ultimately, identifying your preferred career, as well as an alternative option that you think you'd be happy with.
3. set some specific goals to prepare you for the career paths to which you aspire. After discussing these goals and outlining strategies with your primary mentor,
4. put the plan into place.



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MyIDP

- Store your progress on the MyIDP Web portal
 - your information will be kept private, viewable by only you and those you wish to share it with—and you can request automated reminders to help you keep on top of your deadlines.

Other tips

- Prioritize your action plans
 - What will provided the greatest value
- Implement something every day
- Seek feedback and support
 - Mentors
 - Colleagues
 - Peers
- Face your barriers
- Reflect – what worked, what didn't



Annual Evaluation

- Required
- Department determined format and process
 - Self assessment
 - Face-to-face meeting with supervisor
- Final report is part of your “permanent record”
- Last 5 annual evaluations by Chair will become part of your Promotion Packet



The Annual Self Assessment

- Descriptions and listing of accomplishments over the past year
- Clinical
- Teaching
- Research/Scholarship
- Service
- (Administration)
- (VA) - *but include VA academic mission elements in your total UF mission accomplishments when you seek promotion*

Be proactive

- At the meeting, summarize your mission specific accomplishments
- **Produce your IDP/IAP for the next year!**
- **Agree on 1 year, and longer term goals**
- Discuss which resources/support you will need to accomplish
 - Negotiate for what supervisor will need to provide
- Don't be afraid to ask for an interim meeting if the plan changes mid year
- Update your chair with accomplishments throughout the year
- Use your mentor for more frequent meetings



Be sure that achieving your goals

✓ Also enhances the goals of the
Department and College



6. *Revisit*

- Based on feedback at annual evaluation (or better after 6 months), remove goals achieved
- Remove goals no longer worth pursuing or no longer able to accomplish
- Add new goals

Assess

Where are you today?

Write, Discuss

Where should you be in the future?

In 1 year?

In 5 years?

Write, Discuss

How will you get there?

- *Planning*
- *Resources*

Implement, Revise, Revisit

Are you getting there?

Can you sustain?

Mission & Values

Environment

Vision & Goals

Strategic Initiatives

Operating Plans

Metrics/Evaluation

Strategic Plan