

# Aligning Goals and Expectations using an Individual Development Plan (IDP)

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Career Advancement, International and Postdoctoral Services

# What will we cover in this session?

Why you and your mentee should use an IDP

IDP's from your mentee's perspective

- What is an IDP?
- What should a completed IDP look like?

IDP process from the mentor's perspective:

- Using an IDP to structure your mentoring conversations
- Using an IDP to motivate your mentee
- Using the IDP process for accountability

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# Why you and your mentee should use an IDP

Funders may require or encourage the use of IDP's

## BIOMEDICAL RESEARCH WORKFORCE WORKING GROUP REPORT

A Working Group of the Advisory Committee to the Director

NIH Encourages Institutions to Develop Individual Development Plans for Graduate Students and Postdoctoral Researchers

Notice Number: NOT-OD-13-093

### Key Dates

Release Date: July 23, 2013

### Issued by

National Institutes of Health (NIH)

### Purpose

The purpose of this Guide Notice is to announce that NIH encourages through the use of Individual Development Plans (IDPs). Institutions (RPPR).

### Background

A Working Group of the Advisory Committee to the NIH Director (

The screenshot shows the American Heart Association's website. The top navigation bar includes links for STATEMENTS & GUIDELINES, SESSIONS, EDUCATION, RESEARCH (highlighted), and SCIENCE NEWS. Below this is a sub-navigation bar with links for About Our Research, Funding Opportunities, Peer Review, Awards Management, Grants@Heart, and Science Techno Acceler. The main content area is titled "Individual Development Plan". Below the title are social media sharing buttons for LinkedIn, Facebook, Twitter, and Google+, along with a "Share" button and a count of 23. The text below the buttons states: "Please note, this document will be created using the <http://myidp.sciencecareers.org/> website. AHA requires the use of myIDP's online assessment tool to create your Individual Development Plan (IDP). IDP is a professional development tool that can help predoctoral and postdoctoral fellows and early career investigators identify professional development needs and career objectives. The self-assessment process, is the basis of your IDP, SHOULD BE STARTED WELL IN ADVANCE OF THE AHA APPLICATION DEADLINE. Also allow time to discuss your IDP with your sponsor/mentor, as s/he will be asked to address the Sponsor's Training Plan."

### Individual Development Plans (IDPs)

In January, 2007, representatives from HRA member organizations met to consider the benefits and implications of adding a requirement for an IDP as a component of health research and training awards for postdoctoral fellows and early career investigators. Despite data demonstrating the correlation between the use of IDPs and postdoctoral productivity, IDPs are not widely used in the mentoring of postdoctoral fellows. An IDP is a professional development tool that can help postdoctoral fellows and early career investigators identify professional development needs and career objectives. Specifically, the goals of the IDP are to:

- Identify short-term needs to improve performance
- Identify long-term career options and the training necessary to realize those options
- Clarify work expectations
- Foster communication between the advisor and the trainee

The Federation of American Societies for Experimental Biology (FASEB) has taken a leading role in promoting the use of the IDP. Check out FASEB's [description of the goals, benefits and process of the IDP](#) along with a list of references on self-assessment, the postdoctoral experience, career opportunities, and resources on non-academic careers. Also see FASEB's [Sample Annual Review](#).

### CONTACT US

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# What is an IDP?

## IDP is a *Process*

- Purposeful goal setting activity by the mentee
- Capped by supportive constructive feedback session with mentor
- Iterative, repetitive process

# IDP is a Process – Four steps include

## 1. **Assessment** – looking back and taking stock

- What have I accomplished?
- Assessing my skills, values, interests

## 2. **Career exploration**

- What is my post-training career goal?

## 3. **Goal setting**

- What will I accomplish in the next year?
  - To finish my training stage
  - To reach my post-training career goal?

## 4. **Mentor and Mentee – Implementation**

- How will I engage my mentors to help me accomplish all that I must do?

# IDP is a Process – Four steps include

Mentee alone

1. **Assessment** – looking back and taking stock

- What have I accomplished?
- Assessing my skills, values, interests

2. **Career exploration**

- What is my post-training career goal?

3. **Goal setting**

- What will I accomplish in the next year?
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4. **Mentor and Mentee – Implementation**

- How will I engage my mentors to help me accomplish all that I must do?



# What is an IDP?

## IDP is also a *Product*

- Written document
- Answers two critical areas of career planning
  - Big picture plan: Where am I headed with my career? On the right track?
  - Annual plan: How will I get there? How will I continue to succeed?

# What does a completed IDP “product” include?

## Taking stock:

- Looking backward – What have I accomplished? How have I improved?
- Current assessment – What are my skills? What engages me? What rewards or outcomes (values) do I need from my work?

## Looking forward:

- Plan A/Plan B: Career goals
- A written list of (annual) goals mapped onto a timeline
- Annual goals should be in service of your mentee’s Plan A and B career goals

# 1. Basic sciences PhD trainee model, using the myIDP tool

The screenshot shows the myIDP (my Individual Development Plan) tool interface. The main header displays the user's name, Bruce Jenkins, and the URL <https://myidp.sciencecareers.org/Plan/Summary>. The sidebar menu on the left includes sections for Overview, Personal Information, Assessment, Career Exploration, Set Goals, and Implement Plan. The main content area shows the 'Personal Information' section with details such as Title (Graduate student), Institution (UCSF), and Position start/end dates. Below this is the 'Career Plans Summary' section, which includes 'Plan A' and 'Plan B' with their respective long and short-term goals. The 'SMART Goal Summary' section at the bottom notes that goals are for 12 months from now.

**Individual Development Plan Overview**

An Individual Development Plan (IDP) is a structured planning tool designed to help you:

- identify long-term career goals that fit with your unique skills, interests, and values,
- make a plan for improving your skills,
- set goals for the coming year to improve efficiency and productivity, and
- structure productive conversations with your mentor(s) about your career plans and development.

This module will guide you through the process of creating an IDP:

1. Self-assessment  
Consider your skills, values, and interests.
2. Set goals  
Identify long-term career goals that fit with your unique skills, interests, and values.
3. Explore career options  
Consider career fit, read about careers, attend events, talk to people, and choose a career path.
4. Implement plan  
Recruit mentors, set goals, and help with various parts of your plan.

**Personal Information**

Title: Graduate student  
Institution: UCSF  
Position start date: 9/1/2011  
Position end date: 12/22/2015  
Research project: The role of hydrogen bonding in enzyme catalysis  
IDP last modified: 9/17/2015

**Career Plans Summary**

**Plan A**

Long Term Goal: Writer for a journal news section  
Short Term Goal: Science communication certificate (UC Santa Cruz); or free

**Plan B**

Long Term Goal: Teaching at a community college  
Short Term Goal: more teaching experience

**SMART Goal Summary**

Note: goals after 12 months from now are not shown.

**January, 2015**



### 3. Mentee/Mentor model, from Angela DePace's research group at Harvard

#### GOALS and PLANNING FROM ANGE

Accomplishments (from previous timeframe)

Published paper  
Drafted main paper including new experiments  
Genome editing experiment in progress  
Wrote NSF research plan; funded!  
Followup transgenics in progress  
Tried CRISPRi - need to troubleshoot  
Coff poster  
Fly meeting abstract submitted  
Research Goals (for upcoming timeframe)

Continue rescue experiment w/ genome editing  
Measure follow-up constructs  
cis/trans experiments for bifunctionality project

Continue to support CRISPRi  
Followup on enhancer screen

Professional & Personal Goals (for upcoming timeframe)

Apply for communication award  
Submit main paper (think about where)  
DAC #3

Present at a national meeting  
Outline enhancer screen project  
Start thinking about postdoc labs  
Department talk?  
Graduate late 2016

Supervised George - ext in evolution paper  
Supervised Ringo - enhancer experiment  
Supervised Paul - enhancer screen + followup  
Talks at recruitment and retreat  
Organized group meeting and journal club  
Scheduled DAC #3

From Angela - exts on defining regulators

June 2015

Name & date

#### GOALS and PLANNING

January GRANT CONSTRUCT CLONING  
February REDO COMPUTATIONAL ANALYSIS  
March FLY MEETING - poster, look @ postdoc labs  
DAC  
April SUBMIT PAPER #1?  
May  
June SEND IN REVISION OF P-01  
July DATA COLLECTION ON TF CONSTRUCTS

#### GOALS and PLANNING

FROM ANGELA

Accomplishments (from previous timeframe)  
Helped to plan and write NSF grant.  
Published paper!  
Mentored George, Ringo and Paul  
Organized and executed Genetics bootcamp course  
Executed all CRISPRi cloning, got back transgenic flies  
Finished data collection for all synthetic enhancers, have found the narrative for the paper  
Half-way done with identifying all the regulators for 2nd enhancer project  
Poster @ CSHL  
Poster @ Fly Meeting

June Smith 2015

Grad program recruitment & retreat  
DAC Meetings  
Took over organizing journal club.

June Smith 2015  
Name & date

piece of data on transgenic rescue  
stifying all regulators, consider their functional role  
ject, complete cis and trans experiments outlined in the grant  
experiments suggested by your committee  
ed in this, haven't taken  
s yet.

longer term, think  
about coordinating  
this project with  
John.

frame)  
pts above  
5  
Aiming for research & teaching  
at undergrad institution  
submit #1 (eLife, PLoS Bio, MSB,  
or PLoS Genetics)  
s for postdocs late 2015/early 2016.

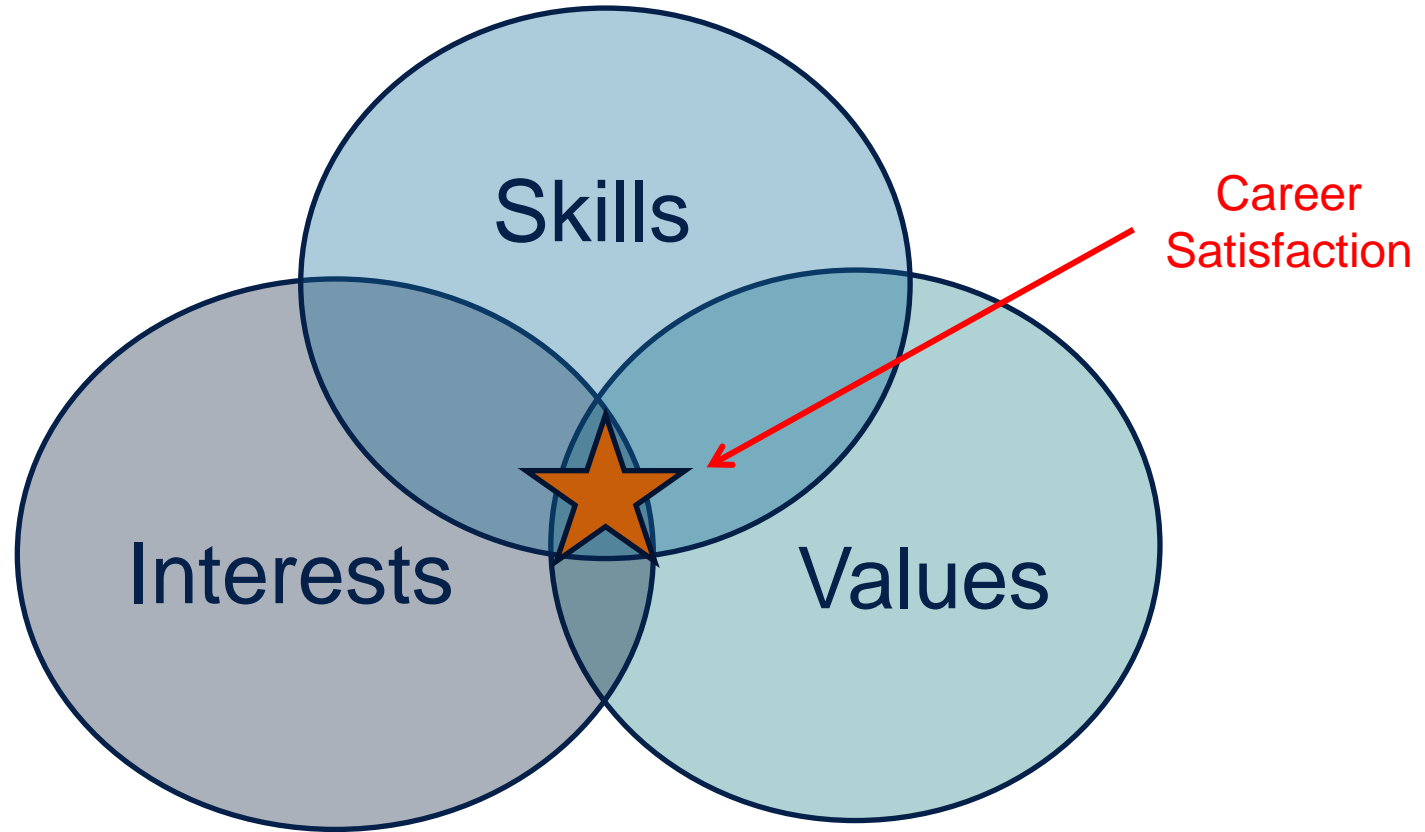
# Try starting your own IDP

## Step 1: Start with Self Assessment

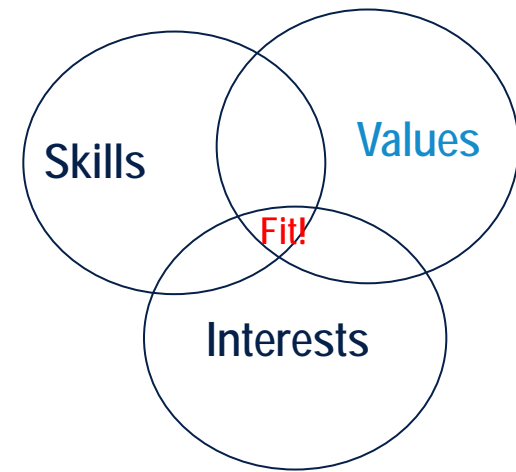
**Skills Assessment:** Are there tasks where you excel? Where do you want to improve?

**Values Assessment:** What rewards or outcomes are most important? What work conditions would you prioritize?

# Why is assessment important – skills, interests, values?



# Values Clarification Discussion

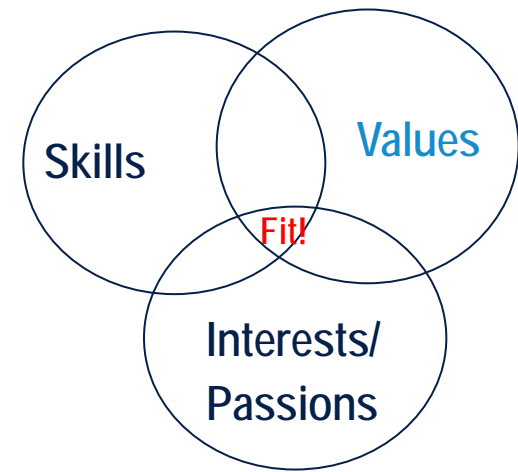


Share with your partner:

- Introductions
- What is one value that you ranked as most important?
- What is one challenge you will face in your current role, due to the fact that you hold that value most important?
- What is one potential solution to that challenge?
- Partner: What is ANOTHER potential solution to that challenge?
- 3 minutes per partner



# Values Clarification Discussion



## Lessons:

- No career option is perfect
- There will be values-related challenges to every career option
- There will be skills challenges to every career option
- Plan to deal with challenges, or change careers
- Colleagues and mentors can help you solve challenges

# Let's begin an IDP

**Step 2: Think and write responses to the first four prompts on the IDP form**

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**Discuss IDP writing experience with partner**

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# What is an IDP?

## **Mentor's perspective:**

- Productivity tool
- Provides structure for the conversations you must have with your mentees
- Structure for aligning goals and expectations
- Effective mentoring tool by itself

IDP's from the **mentor's perspective:**

## Structuring your periodic IDP conversations

1. Make it formal
2. Take time to plan the conversation
3. Adopt motivating feedback practices
4. Allow your mentee to provide feedback to you
5. Address misalignments directly

IDP's from the **mentee's perspective:**

## Talking about your IDP with your mentor

1. Purpose of an IDP is to structure your meetings with your mentor
2. Make it formal – *you* may have to make the appointment
3. Get away from the office/lab if possible
4. Use language such as:
  - “Could you help me with...?”
  - “Would you be willing to...?”
5. Be prepared to negotiate

# Practice/Application

- Scenarios for alignment of mentor/mentee goals and



