

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

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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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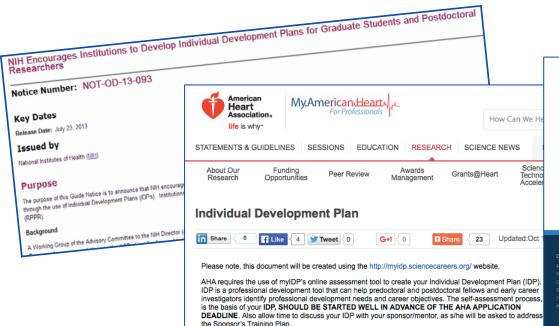
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Why you and your mentee should use an IDP

Funders may require or encourage the use of IDP's





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

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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?



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 - 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:

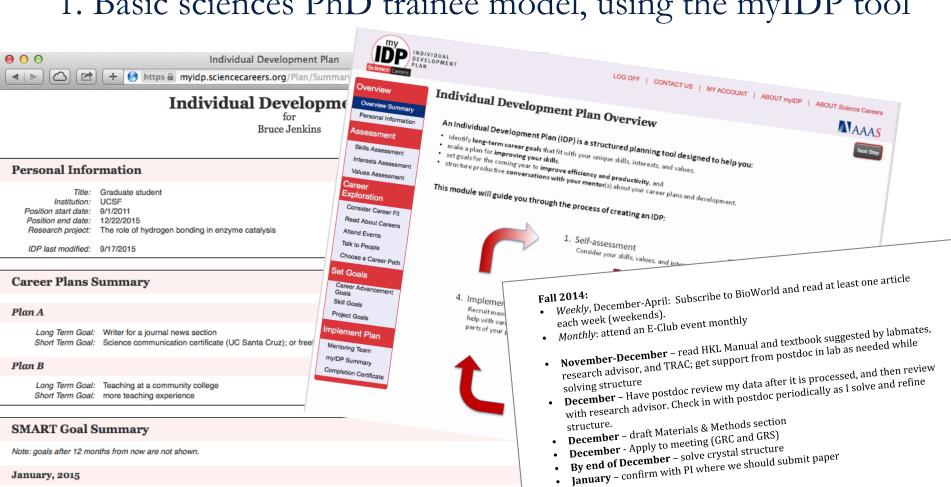
- Looking backward What have I accomplished? How have I improved?
- Current assessment What are my skills? What engages me? What rewards or outcomes (values) do I need from my work?

Looking forward:

- Plan A/Plan B: Career goals
- A <u>written</u> 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



2. Clinical fellow model, using UCSF Peds' portfolio tool

Please list what you have accomplished this year to-date in each of the following areas as well as your specific short range goals for the next 6-12 months of fellowship. This section is to enhance information not captured on your CV such as works in progress, milestones, and timelines, etc.

Research Activities:

- Accomplishments:
- Submitted PAS Abstract Thrombocytopenia at the onset of pediatric acute respiratory distress syndrome (AROS) is associated with increased
- Presented Thrombomodulin abstract at European Association of Pediatric Societies Meeting - Barcelona - Oct 2014
- Completed 2 day Apex Clarity "Sensel" course to gain direct access to the Clarity Database - working on mentored project to extract pediatric ARDS
- овка или эжрги, гл completed literature review and SNP selection for Genetics in Pediatric ALI
- Continued work on expanding Chatter within the UCSF peds environment and developing CLABSI app with multimedia instructional videos - Arup Roy-Burman as Pl/Mentor on this QI Project

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- Short term goals: - Await PAS abstract acceptance notification - continue moving forward with SNP array and will likely have initial
- work toward proficiency in array analysis software (self directed learning)
 assist with roll-out of multiple CPCCRN studies that our PICU will be preliminary data within the next several months
- participating in Anil Sapru, Pl

Patient Care (Clinical Activities):

- Accomplishments:
- completed 1.5 year with combined service at CHO, UCSF Parnassus, 1 week transport, 1 month adult ICU, and 3+ weeks anesthesia at CHO. week transport, a mouth addit too, and 34 weeks amounted at order improvement in overall feedback scores over the course of the year
 - procedure competency
- · Short term goals: - continue to condense sign-out with I-PASS
- improved concise synthesis and prioritization of patient care as I move more toward attending-level responsibilities
- improve trauma and traumatic brain injury management - improve my own inter-specialty communication and orchestration

Professional Self-Development (Training Activities):

- Accomplishments:
- Board Certified in General Pediatrics 2013
- Good 2014 In-Training Exam Results
- Apex Reporting "Sensel" Training August 2014 - Attended 2014 EAPS Conference - Barcelona - October 2014
- Short term goals:
- follow-up on 2015 in-training exam results - TICR course summer 2014

Education (Teaching Activities):

 Accomplishments: a instructor June 2014

major focus is.

X	Physician Research Scientist

- development of educational modules for CLABSI assessment app. Plan to expand eventually to multiple learning areas for nursing and other providers

Other professional accomplishments:

- Accomplishments: - Joined PICU Unit Based Leadership Team (UBLT) for continuous process improvement program at UCSF certified as bilingual clinician (Spanish) at UCSF - 2014
- Short term goals:
- help lead development of PICU processes and workflows as we migrate to

PLACING FEEDBACK 1. Scroll down to the bottom of the portfolio;

2. Click on Place Feedback' a popup window 3. Stan typing your feedback/comments in the ! 4. Please be sure that the 'Make comments put

5. Click the Place Feeback' button, Your feedback is now;

2. Your program director

3. The SOC administrator

the Mission Bay site in Feb 2015

- Coursework:
- TICR Fall Course 2014 DCR Course - Grade: A - RCR Course - Grade: Pass
- DISTRIBUTION OF EFFORT

If not on track in any area please explain:

DUTIES	ACTUAL	IDEAL	ON 1
	%	%	Yes
Research	25	30	X
Patient Care	48	30-40	X
Professional Self- Development	10	10	X
Education (Teaching)	15	10-20	X
Administration	2	5	×
Service/Citizenship	0	5	\Box
TOTAL DUTIES	100%	100%	[
			/

practice environments are like. I would also like to explore more explicitly

ABP SCHOLARLY ACTIVITY

Anticipated work product/methods of scholarly a

X Biomedical research (laboratory, clinical Meta-analysis of literature Systematic review of clinical practice

Feedback Sandrin = 04 April 2014, 11:33 AM has accomplished a remarkable amount considering his heavy of submitted an abstract to PAS (which even though not accepted, according an acoust or the forces when thought for according to according to the detail field to work out some of the detail anguaror, autour no we are new to weak to assure a service memory who has a lot of experience with this type of Work, I have no mentor who has a six or expension was the type or many a service as a solident from his throwement in a project focused on star engage. as a evaluar man manuscrimen in a project income of a constitution in a Oat project. On the other hand, will review his p for paracipation in a Use project. Un the cores ratio, a not review have fack. We will also contribute to discuss failure corner goals and how we over the next few years to allow for adequate time for research.

Joseph Shieh - 09 April 2014, 4:44 PM

has taken great in liabing to learn more about canadica to kin of his goals for his followship and his separation that I can provide I would be have

YEAR IN REVIEW AND SHORT RANGE GOALS CAREER TRACK AND LONG RANGE GOALS

What is your career track? Choose any of the following and explain what your

Physician Educator Scientist

Other (explain)

× Undecided

× Consulting Master Clinical Subspecialist

vs. community-based pediatric medical center 2. Clinical focus: general pediatric critical care, medical technology

Research Scientist (PhD. other non-clinician)

What are your long range career goals within this career track? Include

1. Type of employment (academic, community, etc.): academic university

3. Research/scholarly creativity focus; genetics in association with pediatric acute lung injury and critical care. Additionally I am working on

development of technological tools to improve hospital staff engagement

4. Education (teaching): I hope to have resident and possibly medical student

to become involved in further educating my peers through CME or other

5. Job hunt (have you begun the process of preparing formally for the job hunt

months): I have gone to one (Kaiser) job fair, which was not especially

- what have you done to date, what are your plans over the next 12

enlightening. I would like to speak with other pediatric critical care

physicians outside of my institutions to understand better what other

the potential opportunities for me to continue to work within the UCSF

education as a significant part, though likely not the primary focus, of my

work. Depending on my development of clinical expertise I would also like

community after my fellowship. BARRIERS AND SUGGESTIONS

medical conferences.

1. What was/were the biggest barrier(s) to accomplishing your goals last year (be specific) and what specific actions have you taken /plan to take?: The biggest barriers were 1) initially my clinical service time was an impediment to my other goals. I have subsequently taken on a great deal ity and comptimes find muncli stratahed too thin to

3. Mentee/Mentor model, from Angela DePace's

research group at Harvard GOALS and PLANNING FROM ANGELA-Jane 2015 GOALS and PLANNING Accomplishments (from previous timeframe) Jane Smith 2015 FROM TANE Name & date Helped to plan and write NSF grant. LPublished paper! Grad program recruitment livetreat Superaised George - expt in woluter paper Accomplishments (from previous timeframe) Mentored George, Hingo and Paul Supervised Rings - sufficiency experiment Published paper DAC Meetings VOrganized and executed Genetics bootcomp course Supervised Paul - cotactor screen + followup Drafted main paper induling was experients VExecuted all CRISPRi cloning, got back transgenic flies Took over organizing journal club. Talks at recruitment and retreat Genome editing experient in progress Finished data collection for all synthetic enhancers, have found the narrative for the paper Organizal group meeting and journal abels wrote NSF research plan; funded ! Half-way done with identifying all the regulators for 2nd enhancer project Schehnled DAC 43 Followup transgenics in progress Trick crisps: - mak to troubleshest From Angela - expts on Poster @ Fly Meeting Cott poster defining regulators Fly meeting abstract submitted Research Goals (for upcoming timeframe) Jane Smith 2015 al piece of data on transgenic rescue GOALS and PLANNING Continue rescue experiment wo menous editing stifying all regulators, consider their functional role January 1-GRANT CONSTRUCT CLONING Measure follow-p constructs ject, complete cis and trans experiments outlined in the grant experiments suggested by your committee cist trans experiments for situationality project ed in this haven't taken February - REDO COMPUTATIONAL ANALYSIS Continue to support CRESPET & low priority s yel longer term, think about coordinating FLY MEETING - poster, look @ postdoc labs Professional & Personal Goals (for upcoming timeframe) meframe) SUBMIT PAPER-417 Apply for communication award Aiming for research & teaching at undergrad Institution Subuit main paper (think about where) May DAC #3 IF and Present at a notional meeting submit #1(elife, Plos Bio, MSB, research author wheeler screen project SEND IN REVISION OF POL cost in or PLOS Genetics) Start thinking about posture · CONTACT s for postalocs late 2015/early 2016. Department talk? A DATA COLLECTION ON TE CONSTRUCTS focused on Grahude late 2016

Try starting your own IDP

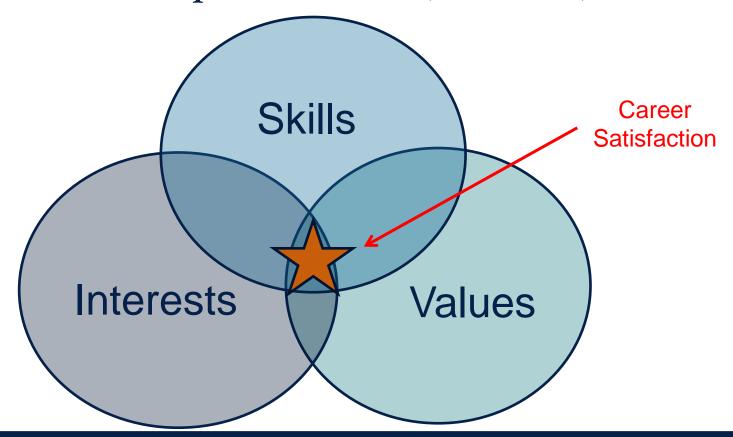
Step 1: Start with Self Assessment

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?



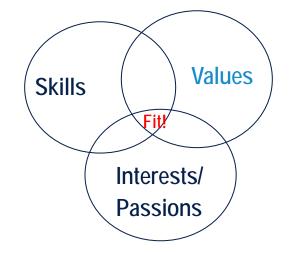
Values Clarification Discussion

Skills Values Interests

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

- 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

- 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



