

Resources for using IDP's to align mentor/mentee goals and expectations

IDP Models:

PhD students and postdocs:

myIDP.sciencecareers.org

Clinician researcher trainees and fellows:

Search for “*UCSF CTSI mentoring meeting and individual development plan*”

Faculty (format used in this workshop):

Search for “*UCSF faculty IDP academic affairs*”

General biomedical research group model:

Search for “*Angela Depace lab yearly planning meetings*”

Suggestions for meeting with your mentee

1. Make it formal

- Schedule a specific time and duration
- Neutral place that encourages conversation
- Share an **agenda** in advance – reduces nervousness

Mentee shares first, using written IDP as guide

- Listen actively, don't interrupt

Mentor provides feedback and offers help

- Address misalignments directly

Mentor seeks feedback from mentee

Mentor and mentee agree on what will be accomplished in future period

Set time for next follow up

End encouragingly

2. Take time to plan for the meeting

- What do you hope your mentee will accomplish in the near and long terms?
What are your goals for the mentor?
- What specific accomplishments from the past term will you point out?
- What praise can you offer about your mentees progress, skills, or unique gifts?
- What would you like for your mentee to have done differently?
Accomplished more of? Where are they not performing to expectation?
- What specific help or resources can you offer your mentee?
- Who are additional mentors or advisors your mentee should seek out?

3. Adopt motivating feedback practices

- Start your part of the meeting with the positive
- Challenge your mentee's short term and long term strategy:
"How will these goals for the next year help you reach the longer term career outcomes (Plan A or B) that you've outlined for yourself?"
- Get your mentee to use the SMART Goal Setting device. Are mentee's goals:
 - Specific?
 - Measurable?
 - Action-oriented?
 - Realistic/Reasonable?
 - Time-bound?*"You've said you will submit a paper by March. That's too big, not **specific** enough. Rewrite that goal so that I know when you will be sending me a draft of each section."*
- Be specific in your criticism:
 - Avoid: "You never" or "You always"
 - Vague criticism invites frustration
 - Use: "I would like to see more of..."
- Offer help when motivating your mentee to higher performance. Use:
 - "How can I help?"*
 - "What resources can I provide to help you achieve this next level we've agreed on?"*

4. Allow your mentee to provide feedback to you

- *"What do you need more or less of from me?"*
- Ask open ended questions about dynamics in the work group or research group
- Respond in writing to each issue brought up
- Be clear when you cannot or will not provide a request

5. Address misalignments promptly and directly during the meeting

- Develop a verbal boilerplate to use that fits your style

Might change depending on relationship

"My expectations are..." or "We agreed that..."

- Write down items where your goals and your mentees goals are misaligned
- Share a copy of your list to use when coming to agreement on goals for the next time