

# Individual Development Plan

For BPRI Mentors

## Section 1: Introduction to Develop Individual Development Plan

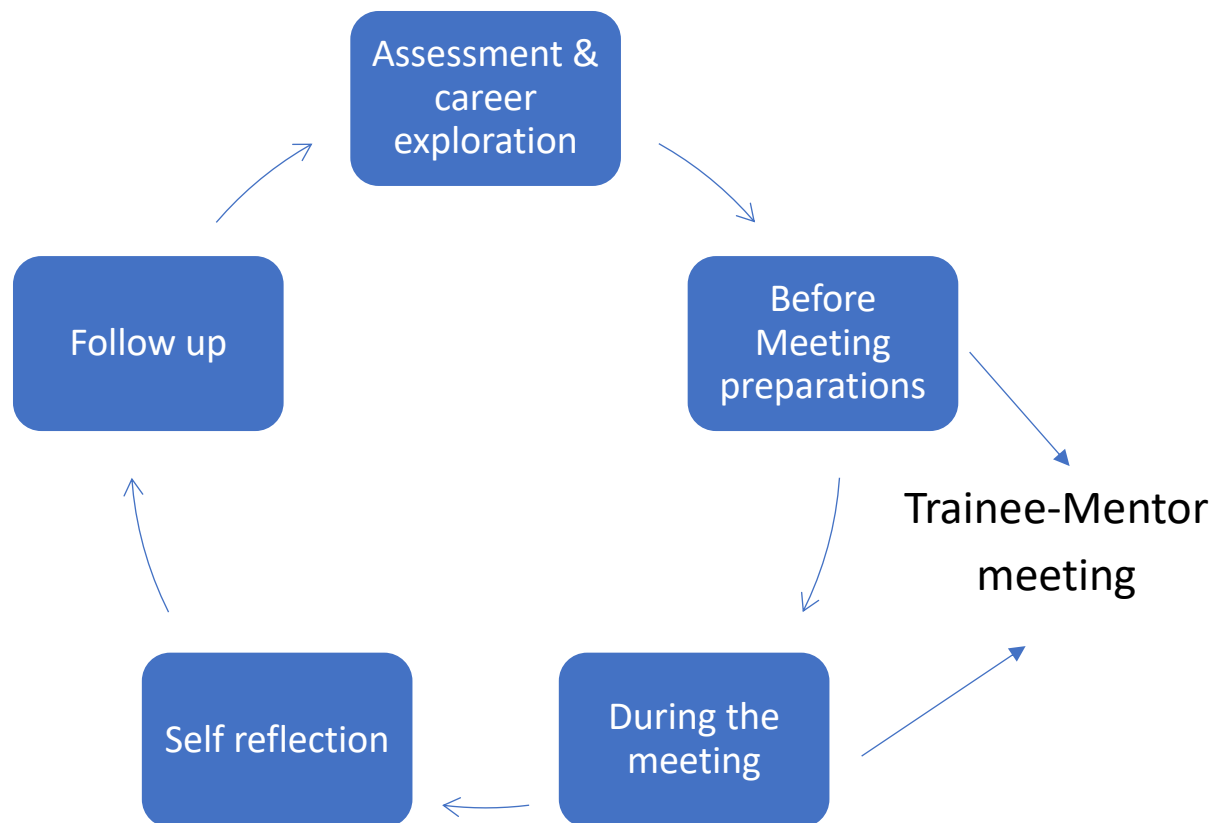
An Individual Development Plan (IDP) is a tool that is commonly used to help employees define and pursue their career goals. IDPs can help trainees (at any level) assess their current skills, interests, and strengths. Further, it allows the planning of skill development to meet career goals. It also helps to facilitate discussion with your mentee and maintain a good working relationship.

Completing the IDP process required an understanding of the IDP process and commitment from both trainees and mentors. This document provides resources to succeed in this process.

First review the informational videos on IDP:

1. [IDP: A guide to making burdened process into a rewarding process](https://youtu.be/LkO8HJpkTsk)  
(<https://youtu.be/LkO8HJpkTsk>)
2. [IDP: What does the literature tell us about IDP](https://youtu.be/PB0cVZAS3gQ)  
(<https://youtu.be/PB0cVZAS3gQ>)

### IDP process



## Format of the IDP

In the BPRI, each partnering institution uses different formats for their IDP. If an IDP is mandatory for your degree/postdoctoral program, we strongly recommend following the required IDP format. If the IDP is an optional requirement, you can encourage STEM students to use the myIDP web tool (<http://myidp.sciencecareers.org/>), and the ImaginePHD web tool for humanities and social sciences students/postdocs. (<https://www.imaginephd.com/>).

For consistency and follow-up purposes, we are requesting all trainees to use the goals and planning worksheet [adapted from Vincent et al., (2015)] to formulate yearly goals related to BPRI research, professional, and personal goals. In the BPRI IDP, each mentor creates a yearly goals and planning sheet for their trainees. We recommend different steps for trainees who already have an IDP and those who do not yet have one. Please ask your trainees to follow the trainees' guide.

## Steps for mentoring trainees

### Before the meeting

- Complete the mentor's goals and planning worksheet formulating the goals that you have in mind for the trainee. Additionally, remember to identify the trainee's accomplishments last semester/year and note them down on the sheet. The worksheet allows you to list the yearly work plan for each trainee. The mentor's goals and planning worksheet is a supplementary document for trainees which shows the mentor's expectations. It is highly recommended to complete the mentor goals and planning worksheet before you look at the trainee's planning sheet.
- Request a summary of the suggested career paths of the trainee (Note: trainees can download this from the MyIDP web portal after completing the skills, interests, and value assessment). Also, request any information that the trainee has collected related to his/her chosen career path.
- Ask trainees to share the goals and planning worksheet at least two weeks before the trainee's annual IDP review or IDP planning meeting.
- Familiarize yourself with the career path trainee has selected (section 4 provides additional resources). If you are unfamiliar with nonacademic career paths talk with your institutional career counseling service to get information.
- Reflect upon your expectations (i.e., compare your goals and planning worksheet with the trainee's worksheet). Review and revise your goals (i.e., expectations) as needed. Note that you do not require to complete all sections of the worksheet, but you need to clarify research and professional development expectations equally. Section 3 provides additional resources that help you to identify goals. It is recommended to identify at least one professional development goal for your trainee. DO NOT leave this rubric blank.

- Ensure that your drafted goals are learning goals, not performance goals (learning goals are goals that help the trainee to discover how to perform a task correctly).
- If a trainee has identified too many goals, categorize them into high, medium, and low priority.
- If you are unfamiliar with the IDP process, you can share your draft worksheet with the education coordinator and get feedback before the meeting.

### **During the meeting**

- Always start the meeting with a discussion about the trainee's accomplishments.
- Discuss yearly goals with your trainee. During the meeting use the printed version of the worksheet, and write down goals agreed by both the trainee and mentor. Remember to discuss your expectations and how those expectations are aligned with the trainee's career or graduation plan.
- Mutually agree on the timeline proposed by student. Consider the grant reporting timeline and ensure that trainees are aware of reporting deadlines.
- Mutually agree on prioritized goals and identify barriers (if possible).
- Discuss flexibility in this yearly plan (i.e., how you handle failures to meet expectations).
- Discuss your feedback at the end of the meeting: always ask the trainee to share his/her feedback first.
- At the end of the meeting scan the handwriting worksheet shared with the trainee. Note that having handwritten sheets help the trainee to be accountable to achieve agreed goals.

### **Self-reflection and follow up**

- Submit copies of agreed goals and planning worksheets to the education coordinator.
- Add the trainee's IDP review deadline to your calendar.
- FOLLOW UP monthly (at least have a conversation about the IDP during the lab meetings).
- Work on feedback received from trainees and commit to improving your mentoring skills.
- Some reflective questions
  - Did I share all expectations that I have for my trainee?
  - Did I share relevant information adequately covering all three goals: research, professional, and personal?
  - Did I respond to the trainee adequately & promptly?
  - Think about things that are: Going well, need improvement, are not worth the effort and should be discarded.

## **Annual review of the IDP**

- Meet with your trainee to annually review his/her IDP. Discuss and evaluate the progress of trainees towards achieving each goal. We encourage you to have this meeting before August each year.
- Identify the goals that have not been accomplished so far and new goals for upcoming years. Create a goals and planning sheet for each year by revising the old goals and planning worksheet. Additionally, encourage your students to re-do the skills, interests, and value assessments (using myIDP or IMAGINE PHD) to see their progress and identify areas that still need to improve.
- Share your evaluation of the previous year, reanalysis of skills, interests, and value assessments, and revise the goals and planning worksheet with the education coordinator (we encourage you to submit these documents before October each year).

## **Section 2: Things to Remember as a Mentor**

The following list is adapted from the University of Florida, Hobin et.al, (2014), and Vincent et al., (2015).

### **Advisor/Supervisor**

- Be committed to a student's/postdocs' education and training as a future member of the research community.
- Be committed to guiding a student's /postdoc's research project, allowing them to take ownership of their research.
- Encourage students to set reasonable goals and establish a timeline for completion.
- Closely check whether the trainee's goals are specific, measurable, action-oriented, realistic, and time-bound goals based on the trainee's background, career interest, and capacity level.
- Provide and seek regular and honest feedback on an ongoing basis. Figure 1 has guidelines that help to develop constructive feedback.
- Commit to improving as a mentor.
- Be open to students by encouraging them to bring concerns to you, while aiming to find acceptable solutions for all concerned.
- Be knowledgeable of and guide students through the graduate program's requirements/deadlines as well as the BPRI assessment and activities.
- Advise and assist with a student's thesis committee selection (In the context of the BPRI help students to identify mentors who are keen on interdisciplinary work).

- Lead by example and facilitate training in complementary skills needed for a successful career, such as communication, writing, management, and ethical behavior. See section 4 for more information.
- Discuss authorship policies, acknowledge the student's research contributions, and work with students to aid in publishing their work promptly before their graduation.
- Familiarize yourself with the career-planning resources offered by your institution and scientific societies, so that you can direct trainees to those resources. See section 4 for more information.
- Encourage trainees to participate in career and professional development programs offered through your institution, scientific meetings, and professional societies.
- Focus on helping trainees identify goals that promote the development of knowledge and skills that will enable them to achieve their long-term career goals.
- Keep records on your time commitment towards the mentoring activities such as the frequency and kinds of mentoring, financial and other support provided to mentees, and the productivity of the mentoring relationship.
- Research shows that 21<sup>st</sup>-century graduate students are more stressed than previous generations. Thus, always remember to check on students'/postdocs' physical, mental, and emotional well-being during meetings.

### **Section 3: Guidelines for developing SMART goals for your trainee**

When you develop yearly goals try to create SMART goals. SMART goals are Specific, Measurable, Achievable, Relevant, and Time-bounded goals.

By the end of the fall, I will share information about other related disciplines in the BPRI that would benefit trainees in the process of selecting mentors for the Lab Swap activity.

**Some reflection questions that are helpful to prepare for the IDP meeting** (adapted from Vincent et al., 2015)

- Is someone in the midst of a technically challenging set of experiments?
- Do they need additional expertise?
- Can you help them find a collaborator or other resources to fill the gap?
- Do they need encouragement to persist or permission to move on?
- If someone is considering a job in industry or teaching, do they have all the information they need to decide if this career direction is a good fit? Are they concerned about your opinion? For example, might they fear that if they admit they're not aiming for an academic career you will reduce your support for them?
- Do they have the qualifications that they need to succeed in their chosen career?
- Is their plan to achieve those qualifications realistic, or is it time to adjust their goals?

## Guideline to provide feedback

### Feedback is valuable but few scientists are trained to give it constructively

Many of us think that constructive criticism means saying something nice before you say something harsh. Though this can soften a blow, it misses deeper guidelines governing how to mitigate the sting of giving and receiving criticism. As scientists we have to critique often and it can be quite painful. These guidelines can help.

- 1 Mutual Respect** Constructive criticism has to come from a place of respect. Everyone is a decent person doing her or his best: there can be no character indictment. We are more able to act on both positive and negative feedback if it comes from someone we respect, who we believe has our best interests at heart.
- 2 Be Specific** Specific problems have specific solutions. Vague problems or dissatisfactions don't have solutions, and they invite frustration or commiseration. Being specific is also the easiest way to avoid character indictment. When you stay focused on the specific issue, what might be motivating it, and how it can be resolved, you can avoid unproductive accusatory generalities such as "you always..." or "you never...". Even if you don't have a solution in mind, describing your issue as specifically as possible will allow others to help.
- 3 Keep, Discard, Improve** Giving constructive criticism is like editing: you need to define the stuff to keep (what's going well?), stuff to get rid of (what's not working at all?) and stuff to fix (what has some value but could be improved?). All of these components are critical. Focus only on the good and you lose the opportunity to improve. Focus only on the bad and you lose motivation.
- 4 Mindset: How can I help?** Coming into a meeting with a helpful mindset sets a good tone. PIs and trainees ideally have the same overall goal—for trainees to reach their full potential and succeed scientifically while working with the PI and then to move on to satisfying positions elsewhere. Both of these goals serve both parties. PIs need scientific productivity to maintain the lab. Trainees need experience creating scientific knowledge to earn their credentials and secure their next posts. Instead of considering what the other person can do for you, flip it around. What can you do to help them?

Adapted from Vincent, B. J., Scholes, C., Staller, M. V., Wunderlich, Z., Estrada, J., Park, J., Bragdon, M. D. J., Lopez Rivera, F., Biette, K. M., & DePace, A. H. (2015). Yearly Planning Meetings: Individualized Development Plans Aren't Just More Paperwork. *Molecular Cell*, 58(5), 718–721. <https://doi.org/10.1016/j.molcel.2015.04.025>



### Section 3: Helpful resources for career development information

- National Postdoctoral Association (<https://www.nationalpostdoc.org/>)
- The National Postdoctoral Association identified six core competencies that postdoctoral trainees should achieve during their training. This list gives you an starting point to identify professional development goals for trainees.  
(<https://www.nationalpostdoc.org/page/CoreCompetencies>)
  1. Discipline-specific conceptual knowledge
  2. Research skill development
  3. Communication skills
  4. Professionalism
  5. Leadership and management skills
  6. Responsible conduct of research
- Resource page of the UNC-Chapel Hill Office of Postdoctoral Affairs  
(<https://research.unc.edu/postdoctoral-affairs/professional-development/career-resources/>)
- If you are unfamiliar with nonacademic career paths for a Ph.D. graduate, use InterSECT job simulations. <https://intersectjobsims.com/library/>