

Red text provides directions for using this template. Blue text provides examples to help you communicate directly with mentors. Please read this document before deleting the red and blue text.

Review the 'Guidance for trainees' before completing this worksheet

Goals and Planning Worksheet – Trainees

Trainee Name _____

Primary Mentor Name (with whom you will discuss the IDP) _____

Secondary Mentors (if applicable) _____

Year: **2021-2022**

Trainee Career Goals:

- 1) Chosen Career Path (You can consider more than one career path, but list the top one first)
 - I. Most interesting career path
 - II. Other interesting career paths (if any)

- 2) 5-year career goals

- 3) 10-year career goals

Section 1: Accomplishments (from the previous timeframe)

a) Achieved goals

Identify the things that you have done well during the last semester/year.

Example trainee's feedback to mentors: Thanks for recommending possible outside committee members.

Section 2: Research Goals (goals that can be accomplished by October 2022)

- a) **Research (goals related to lab work)** If you are a Research Assistant, this is your overall goal for year 1 and it needs to be broken down into achievable sub-goals.

REMEMBER: To develop SMART goals, you need to identify actions (i.e., approaches /strategies), deadlines, and outputs for each goal.

Output: Identify a lab diet plan for species X & Y

Action: Review at least two publications per week

Deadline: March 2022

Example of trainee's feedback that helps to negotiate with your mentor:

I am not interested in this topic/ I would like to explore this area later in my graduate program, not this year.

The proposed data collection deadline is difficult to meet because I am taking three classes this semester. Can I suggest XXX instead of YYY?

Helpful questions to identify your research goals

What research hypotheses or questions have you developed in the past year?

How can you continue to build on them?

Are there other related hypotheses or questions to develop?

What research-related skills have you acquired?

What feedback have you received on your research skills?

What further skills do you need to acquire to be successful with your research and future career? How will you gain exposure to these skills and evaluate your competency?

How much time do you spend on experiments or projects that did not work? Are you continuing to solve problems with the experiments or projects, or could there be more important work to consider for this year? If so, how will you identify such experiments or projects?

- b) **Dissertation research goals (goals related to your dissertation research)** If you are a 1st or 2nd year Ph.D. trainee explain the goals helping to narrow down the overall scope of your research to your dissertation topic. If you are a Ph.D. candidate, explain your goals for completing research or writing your dissertation.

Example goal: Select at least three areas that contribute to my dissertation research by the end of February 2022. I will dedicate at least one hour to summarizing my research idea.

REMEMBER: To develop SMART goals, you need to identify actions (i.e., approaches /strategies), deadlines, and outputs for each goal.

Example of trainee's feedback that helps to negotiate with your mentor: I would like to write down the method sections of the second experiment before moving to my third experiment.

Helpful questions to identify your dissertation research goals

How much time have you spent narrowing the scope of your dissertation topic or drafting parts of the dissertation?

Have you developed a schedule this year to meet with your advisor regarding the dissertation?

If you are just beginning your graduate program, are you familiar with your department's process to move students from the coursework to the dissertation defense? If not, who can you ask?

Have you developed your degree plan (i.e., selected courses)? If not, which courses need to be selected?

How productive were you last year with writing the dissertation/manuscripts?

What are your writing strengths and areas needing improvement? How would you seek assistance (e.g., University writing center)?

- c) Interdisciplinary research goals (goals related to exploring another interesting discipline)** Identify an area closely related to your research or worth exploring to advance your research experience with multidisciplinary tools or approaches.

REMEMBER: To develop SMART goals, you need to identify actions (i.e., approaches /strategies), deadlines, and outputs for each goal.

Example of trainee's feedback that helps to negotiate with your mentor: I like the research area of the XXX lab and the possible relationship that you explained between my research topics and YYY lab work.

Helpful questions to identify your interdisciplinary research goals

What research collaborations (intradisciplinary or interdisciplinary) have you established?

Are they successful and beneficial to your scholarly or scientific work?

If so, how can you continue to build on those successes for the coming year? What practices, approaches, techniques will you rely on or adapt for your research?

If they have not yet been successful, how can you improve on your collaborative research skills?

What research-related seminars did you attend? Were they beneficial to your work? What seminars do you need to attend this year?

- d) Papers and publications goals (goals related to publishing your research work)** Identify potential research topics/data that can be developed for the manuscript.

REMEMBER: To develop SMART goals, you need to identify actions (i.e., approaches /strategies), deadlines, and outputs for each goal.

Example of trainee's feedback that helps to negotiate with your mentor: I am interested in attending the YYY conference. Can you help me narrow down the ideas required to prepare a poster?

Helpful questions to identify your publication goals

**Questions were adapted from the individual development plan for graduate students at the University of Minnesota and tailored to the situation of the BPRI*

What papers did you author or co-author in the past year?
Were any of the papers submitted for publication? If not, could any of those be submitted for publication this year, or do you need to write different papers?
How will you identify potential publishing venues?
What types of feedback, formal or informal, have you received on your writing skills?
What specific areas of writing do you need to improve?

Section 3: Professional or personal goals (goals that can be accomplished by October 2022)

- a) **Teaching goals** Would you like opportunities to teach? When do you like to teach?
REMEMBER: To develop SMART goals, you need to identify actions (i.e., approaches /strategies), deadlines, and outputs for each goal.

Helpful questions to identify your teaching goals

Did you do any teaching in the past year (courses, seminars, laboratories)?
Would you like additional opportunities to teach? How will you find these teaching opportunities?
What sorts of feedback, formal or informal, have you received on your course content, syllabi, pedagogy, consideration of diverse learners, and overall teaching abilities? How will you improve your teaching and what resources are available? (Tip: use your teaching evaluation to identify the areas that you need to improve)

- b) **Presentation goals** What presentations (lab meetings, journal clubs, seminars, scientific meetings, or professional conferences) would you like to attend?

REMEMBER: To develop SMART goals, you need to identify actions (i.e., approaches /strategies), deadlines, and outputs for each goal.

Helpful questions to identify presentation goals

What presentations (lab meetings, journal clubs, seminars, scientific meetings, or professional conferences) did you make in the past year?
What sorts of feedback did you receive on the content of your presentation and your presentation skills?
Are there specific presentation skills you would like to improve? How will you do so and what are your resources?
What presentations would you like to make this year?

- c) **Fellowships and grants goals** Explain your interest in developing fellowship or grant proposals and ways to learn grant writing skills

REMEMBER: To develop SMART goals, you need to identify actions (i.e., approaches /strategies), deadlines, and outputs for each goal.

Example of trainee's feedback that helps to negotiate with your mentor: Thanks for the information, I am interested in the departmental research award and would like to develop a proposal.

Helpful questions to identify fellowship and grant goals

What fellowship or grant proposals did you write? Were they funded? If yes, how will you assure that you make progress on these projects this year? If the proposal was not funded, what can you do to improve the application for future submission?

What feedback have you received on your grant writing skills? Are there specific areas you need to develop to attract potential funders? How will you improve your skills and what resources are available?

What grants do you need to write this year?

d) Project management, leadership, and conflict management skills goals What positions, training (within and outside the University) can you pursue this year to enhance your leadership skills?

REMEMBER: To develop SMART goals, you need to identify actions (i.e., approaches /strategies), deadlines, and outputs for each goal.

Helpful questions to identify your project management, leadership, and conflict management skills goals

Project and Budget Management

How much experience do you have with budget management? Do you need to gain more experience managing a research or project budget? How will you accomplish this?

Leadership

What leadership experiences have you had that allowed you to identify objectives, implement plans and acquire decision-making skills?

What positions (within and outside the University) can you pursue this year to enhance your leadership skills?

Diversity and Inclusion/ Conflict Management

What opportunities have you had to develop skills related to justice, equity, diversity, and inclusion activities, or what was your commitment to support and empower disenfranchised communities?

What opportunities have you had to develop skills related to conflict management? Such skills might include the ability to understand:

1. psychological, physiological, and behavioral aspects of conflict
2. cross-cultural considerations in dealing with conflict
3. prevalent conflict management styles and strategies
4. positive opportunities that can be presented by conflict

**Questions were adapted from the individual development plan for graduate students at the University of Minnesota and tailored to the situation of the BPRI*

5. differences between the roles, responsibilities, process, and expected outcomes of mediation, arbitration, and negotiation

6. differences between compromise, cooperation, collaboration, and consensus-building

- e) **Career preparation goals** What job opportunities are available to my major? Are there required certificates/licenses for the chosen career?

REMEMBER: To develop SMART goals, you need to identify actions (i.e., approaches /strategies), deadlines, and outputs for each goal.

Helpful questions to identify your career preparation goals

What job opportunities are available to my major? Are there required certificates/licenses for the chosen career?

Did I update my CV/Resume with information on what I accomplished in the past semester/year?

What kind of information do I want to collect to complete the research statement, teaching philosophy, diversity statement, or job application-related document (e.g., professional portfolio)?

Are there any networking opportunities (career exploration events) that would help me find a job or conduct an informal interview (i.e., identify an individual from the company or institution of interest formulating effective interview questions)?

Who will be my referees for job applications/ how do I keep regular communication with them?

Section 4: Feedback to mentors (consider the overall process of communication between mentors and trainees)

- a) **Strengths:** Explain how you appreciate the mentorship received so far, be specific, give examples by identifying specific examples.
- b) **Weaknesses:** Explain areas that you wish you had more guidance on, or discuss which areas would need extra input from your mentor

REMEMBER TO DISCUSS

Plans for IDP review meetings (frequency of meetings, progress monitoring timeline, and flexibility of this plan)