

The office of career & professional development presents:

Annual Individual Development Plan (IDP)

For Life Science Graduate Students & Postdoctoral Trainees

This **Individual Development Plan (IDP)** is an annual planning tool that helps you identify both professional development needs and career objectives and helps you set and achieve goals.

Purpose of the IDP

This IDP should be one component of a broader mentoring program.

1. The IDP will help the trainee identify long-term career goals and the steps necessary to meet those goals.
2. The IDP will identify annual development needs for improving performance and meeting short-term goals.
3. The IDP should be used to provide structure to career guidance conversations between the trainee and the trainee's mentors.

Outline of the IDP Process

The creation, implementation and annual revision of the IDP require a series of steps to be conducted by the trainee, and then discussed with their mentors.

Part 1	State your career goals and evaluate your progress toward goals. Annually, you should commit to short- and long-term career goals. List accomplishments of the previous year and account for progress toward those goals. Update and attach your CV. <i>[In some cases, you will be directed to the accompanying "CAREER ASSESSMENT WORKSHEET," for help with assessing and defining these career goals.]</i>
Part 2	Evaluate your skills. You should complete an annual evaluation of strengths and weaknesses in skill areas important for the career development of scientists. This "Skills Assessment Worksheet" will serve as the foundation for goal setting in skill areas where development is needed.
Part 3	Set goals for the next year. Set goals in the skills areas where you need further development; set goals for projects that you need to accomplish during the next year; set goals for improved time management and career advancement. Finally, prioritize your goals and create a timeline for reaching those goals. Now, your annual IDP is complete!
Part 4	Implement your IDP. Set an appointment with your mentor(s). Discuss your goals for the year; seek advice and assistance. Then implement your IDP.
Part 5	Repeat Part 1-4 annually.

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career.ucsf.edu

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Annual Individual Development Plan (IDP)

(Name)

(Date)

Part 1: State your career goals and evaluate your progress during the past year.

1. **Who is your primary mentor?** _____
2. **Who is your secondary mentor(s)?** _____
3. **What month and year do you hope to finish this stage of your training?** _____
4. **What is your “Current Career Goal”?** If this is your first IDP, or if your skills/values/interests have changed over the past year, we recommend that you work through the accompanying “Career Assessment Worksheet”.

5. **What is your “Next Step Goal”?** (Examples: for research scientist – a first or second postdoc; for industry scientist – an industry postdoc; for venture capital firm partner – firm associate or management consultant.) If you are not certain, go to Step 6 or the Appendix in the accompanying “Career Assessment Worksheet”.

6. **What were listed as your “Current Career Goal” and “Next Step Goal” last year?** (skip if this is your first IDP)

7. **Update and attach your CV.** It’s best to update your CV annually, to ensure that you have an accurate record of all you have accomplished. Be sure to add papers you’ve written, talks and posters you’ve presented, people you’ve mentored or supervised, guest lectures or courses you’ve taught, etc.

8. **Accomplishments of the Past Year**
Of the “top-10 priority goals” that you set last year, which goals did you meet?

Are there any top-priority goals that you did not meet? Why?

Part 2: Evaluate your skills.

Use the “Skills Assessment Worksheet” below to evaluate your strengths and weaknesses in skill areas recognized as important for scientific career success. *Consider giving a blank copy of this form to a mentor or trusted colleague, to obtain their input on which skills areas you excel at, and where you need improvement.* Your evaluation and that of your mentor/colleague will be helpful as you set goals in areas where you need to improve.

This “Skills Assessment Worksheet” is identical to that found in STEP 1 of the Career Assessment Worksheet.

Skills Assessment Worksheet for Researchers

Assess your strengths and weaknesses in the following skill areas:

4 = Highly proficient
1 = Drastic improvement needed
NA = Not applicable

Research Skills						
	Critical evaluation of data and scientific literature	NA	1	2	3	4
	Experimental design	NA	1	2	3	4
	Problem solving/troubleshooting	NA	1	2	3	4
	Statistical analysis	NA	1	2	3	4
	Computer skills	NA	1	2	3	4
	Creativity/developing new research directions	NA	1	2	3	4
	Skills specific to your field (see prompts below)	NA	1	2	3	4
Professional Skills						
	Oral presentation skills	NA	1	2	3	4
	Manuscript writing skills	NA	1	2	3	4
	Grant/fellowship writing skills	NA	1	2	3	4
	Teaching skills (in a classroom)	NA	1	2	3	4
	Teaching skills (one-on-one)	NA	1	2	3	4
	Identifying mentors and utilizing them effectively	NA	1	2	3	4
	Mentoring others	NA	1	2	3	4
Time Management						
	Meeting deadlines	NA	1	2	3	4
	Establishing priorities within your schedule	NA	1	2	3	4
	Working efficiently	NA	1	2	3	4
	Organizing skills	NA	1	2	3	4
	Flexibility and multitasking	NA	1	2	3	4
Interpersonal Skills						
	Positive relationships with colleagues	NA	1	2	3	4
	Reliability; following through on commitments	NA	1	2	3	4
	Communicating effectively in written correspondence	NA	1	2	3	4
	Communicating effectively in conversation	NA	1	2	3	4
	English proficiency – spoken and/or written	NA	1	2	3	4
	Ability to give and receive constructive feedback	NA	1	2	3	4
	Networking/meeting new colleagues	NA	1	2	3	4
Management and Leadership Skills						
	Data and resource management	NA	1	2	3	4
	Developing/managing budgets	NA	1	2	3	4
	Running a meeting	NA	1	2	3	4
	Establishing priorities for a team	NA	1	2	3	4
	Delegating responsibility					
	Leading and motivating others	NA	1	2	3	4
	Supervising/managing people	NA	1	2	3	4
	Working within an organization	NA	1	2	3	4

List some ***specific laboratory/research techniques*** that you are **highly proficient at**, which could be valuable in a future career path.

List some ***specific laboratory/research techniques*** that you **need to drastically improve** in order to be successful in your current position or future career path.

List some ***specific knowledge areas*** that you **already specialize in**, which could be valuable in a future career path.

List some ***specific knowledge areas*** where you **need to drastically improve** your understanding in order to be successful in your current position or future career path.

Part 3: Set goals for the next year.

In the following “Setting Goals” sections, you will set goals for developing your skills and accomplishing your projects during the coming year.

**Wait to fill in the “overall priority” column until you are finished with all of these sections.*

Setting Goals: Research projects

Scientific question: What are the **scientific questions** that you will be working towards answering in the next year? These may be individual papers (or figures within a single paper) that you aim to publish.

Experimental approach: What are the experimental approaches that you are currently pursuing? Are there other approaches that you could try? Are there additional more promising experiments that you should be doing?

Time management: We all know science doesn’t follow timelines; but it’s important to set limits and goals. How long are you willing to keep trying before you drop each of these experiments/projects? What result or deadline will trigger when you begin the next approach?

Scientific question: _____

Experimental approach (current and potential)	Time management	Overall Priority*

Scientific question: _____

Experimental approach (current and potential)	Time management	Overall Priority*

Scientific question: _____

Experimental approach (current and potential)	Time management	Overall Priority*

Setting Goals: Scientific knowledge

Knowledge area: In what areas do you want to acquire more **scientific knowledge**?

Method for knowledge development: Do you plan to do more *reading* in this area? *Discuss* with specialists? Attend *conferences*?

Time management: How much time do you think you will need to set aside (per week, per month, etc)? Is there an event or time by which you'd like to have achieved this knowledge goal?

Knowledge area	Method for knowledge development	Time management	Overall Priority*

Setting Goals: Research skills

Skills area: What further **research-related or laboratory skills** do you need to acquire to be successful in this step of your career and in the next step? (See the Skills Assessment Worksheet and your answers to the accompanying prompt questions in Part 2 of this IDP.)

Method for skill development: How will you gain exposure to those skills?

Time management: How much time will you set aside to work on developing this skill (per week, per month, etc.)? Since it's easy to postpone skill development compared to "urgent" things that come up, we recommend that you set a date by which you'd like to reach your desired level of competency in this skill.

Research/Laboratory skills	Method for skill development	Time management	Overall Priority*

Setting Goals: Oral presentation projects and skills

Projects: What **talks and/or posters** do you plan to present in the next year? (at lab meetings, journal clubs, in-house seminars and scientific meetings)

Time management: When will this presentation take place? When should you begin preparing?

Presentation projects	Time management	Overall Priority*

Skills area: Are there specific **presentation skills** you would like to work on in the coming year?

Method for skill development: What will you do to develop these skills? (attend professional development workshops, volunteer to give more presentations, attain feedback from mentors and peers)

Time management: How much time will you set aside to work on developing this skill (per week, per month, etc.)? Since it's easy to postpone skill development compared to "urgent" things that come up, we recommend that you set a date by which you'd like to reach your desired level of competency in this skill.

Presentation skills	Method for skill development	Time management	Overall Priority*

Setting Goals: Writing projects and skills

Projects: Are there any **writing projects** that you will be continuing or initiating this year? (fellowships, manuscripts, grants)

Time management: List the stages and sub-steps toward finishing the project. Set goals/deadlines for each stage within the writing process.

Writing projects	Time management	Overall Priority*

Skills area: Are there specific **writing skills** you would like to work on in the coming year?

Method for skill development: What will you do to develop these skills? (writing workshops, practice writing projects, seek editing assistance)

Time management: How much time will you set aside to work on developing this skill (per week, per month, etc.)? Since it's easy to postpone skill development compared to "urgent" things that come up, we recommend that you set a date by which you'd like to reach your desired level of competency in this skill.

Writing skills	Method for skill development	Time management	Overall Priority*

Setting Goals: Teaching and mentoring commitments, experience, and skills

Commitments and experience: Are you committed to teach, or do you plan to get **teaching experience**, this year? If so, what level of student do you plan to teach? Is there a specific program through which you'd like to get this experience? (see career.ucsf.edu/pff → Teaching Opportunities) Will you be **mentoring students** in the lab this year?

Time management: During what months do you plan to do these activities? How will this affect the time you can dedicate to your other projects and goals?

Teaching/mentoring experience	Time management	Overall Priority*

Skills area: Are there specific **teaching or mentoring skills** you would like to work on in the coming year?

Method for skill development: How will you work to develop these skills? (learn by reading, attend teaching or mentoring skills workshops, get classroom feedback from a teaching mentor) (see career.ucsf.edu/pff)

Time management: How much time will you set aside to work on developing this skill (per week, per month, etc.)? Since it's easy to postpone skill development compared to "urgent" things that come up, we recommend that you set a date by which you'd like to reach your desired level of competency in this skill.

Teaching/Mentoring skills	Method for skill development	Time management	Overall Priority*

Setting Goals: Interpersonal skills

Skills area: Would you like to improve your relationships with colleagues? Be more efficient and effective in your professional correspondence? Are there other specific **interpersonal skills** you would like to work on in the coming year? (see the Skills Assessment Worksheet for examples.)

Method for skill development: How will you work to develop these skills? (examples: attend a workshop on how to handle difficult conversations, how to build your professional network, or how to pronounce American English (career.ucsf.edu); practice and ask for periodic direct feedback from a mentor or trusted colleague, etc.)

Time management: How much time will you set aside to work on developing this skill (per week, per month, etc.)? We recommend that you set a date by which you'd like to reach your desired level of competency in each skill.

Interpersonal skills	Method for skill development	Time Management	Overall Priority*

Setting Goals: Management and leadership experience, commitments, and skills

Commitments and experience: Are you committed to a university committee or other leadership role? Do you oversee laboratory equipment or have other **leadership/management** commitments? Will you be supervising someone in your lab? If not, will you seek out such experience?

Time management: During what months do you plan to do these activities? How will this affect the time you can dedicate to your other projects and other goals?

Management/leadership commitments	Time management	Overall Priority*

Skills area: If your current position or future career goal will require you to **lead or manage people, manage resources or time, or communicate well with others**, what specific skills do you need to acquire or improve? What specific skills will you work on in the coming year? (See the Skills Assessment Worksheet for examples.)

Method for skill development: How will you work to develop these skills? (examples: attend workshops/seminars, seek advice of mentors/colleagues or advisors/counselors, ask to lead meetings and seek feedback, seek leadership positions on your campus or professional society)

Time management: How much time will you set aside to work on developing this skill (per week, per month, etc.)? We recommend that you set a date by which you'd like to reach your desired level of competency in each skill.

Management and leadership skills	Method for skill development	Time Management	Overall Priority*

Setting Goals: Career Development Projects

Projects: List additional activities (not already listed in a table above) that you will complete during the next year to learn more about and **move closer to your major career goal**. (expand your network, pursue internship or other resume-building transitional experience, conduct informational interviews with people in your desired career path, read/research potential career paths) If you are not certain about your career goal, or for more ideas for how to learn about career paths, work through the accompanying “Career Assessment Worksheet”.

Time management: During what months do you plan to do these activities? How will this affect the time you can dedicate to your other projects and goals?

Career Development Projects	Time management	Overall Priority*

Prioritizing Your Goals

Looking back at the tables you have created on *pages 6 - 14*, identify the *project and skills-development goals* that you feel belong in your Top 10 Priority list. **Star these goals in the “Overall Priority” box**, or number them in order of priority.

OPTIONAL: Identifying Methods for Assessing Whether You’ve Met Your Goals

When setting goals for skills development, it is important to decide on a concrete method for how you will identify whether you have reached these goals. How will you be certain that you have acquired your desired competency in these skills?

How do I assess my own skill development? A teacher assesses whether her students have learned or developed the correct skills by grading each student by a set of standards. Think of yourself as your own teacher. Identify a method for how you will assess whether you reached your goal for skills development in each area. Set standards, and select a person or group of people (mentor(s), expert(s), peer(s), and/or yourself) to assess whether you have improved and/or met those standards.

Example:

Arnaz would like to improve her science writing skills.

Method for Skill Development: Set aside one hour each Friday to write out her experimental plans for the coming week, as if she were writing the Introduction and Methods section of a paper.

Method for Assessment of Skill Development:

In 3 months, Arnaz will set aside time to assess her improvement in writing. She will use these methods:

1. Self-assessment: Do I feel more comfortable writing now than I did 3 months ago?
2. Expert assessment: I will bring a sample of my writing from both my first week of writing and my most recent week to the Office of Career and Professional Development, and get advice from a science writer there about (a) whether my writing has improved, and (b) what areas of my writing I should be continuing to work on.
3. Peer assessment: My friend is also working on improving her writing. We will meet once a month to look over each other’s writing to give each other feedback on whether the other person’s writing is improving, and what other areas we each could work on.

For this example, we have listed 3 methods for Arnaz. Your own assessment strategy may include fewer methods.

On the next page, make a plan for how you will assess whether or not you have achieved each of your goals...

List your top-priority goals for skills development in this table, and **how you will assess whether you have accomplished each goal**. See the box above for more information about this step.

Top-priority skill to be developed and method for skill development (starred items in the tables on pages 6 – 14)	Method of assessment (How will you assess whether or not you have achieved this goal?)	Time management When and how often will you do this assessment?

Making a Plan

Create a month-by-month timeline for the next twelve months, integrating your top-priority projects and skills development goals that you identified in the “overall priority” boxes on pages 6 - 14. If you also identified ways you will assess whether you achieved these goals (page 15), then include these in your timeline as well.

After you are finished, ***add any deadlines or important dates from this timeline to your daily calendar.*** (Or, post this calendar next to your desk to remind you of your goals & timeline!)

Part 4: Implement your IDP.

Writing your IDP is just the beginning of the career development process and serves as the road map. Now it's time to take action!

- ◆ Discuss your plan with your mentor(s). Set an annual (or more frequent, if appropriate) meeting with each of your mentors or trusted colleagues to obtain feedback on your plan and goals. **Do not hand this multi-page document to your mentors and expect them to absorb all of it! Instead, you may want to keep this lengthy document to yourself, and prepare a concise written outline and agenda for your discussions with mentors.** For example, create a prioritized list of the most important items you wish to discuss, areas where you wish to seek advice, and what specifically you would like from your mentor.
- ◆ Put your plan into action. Read it over regularly to check your progress. Where possible, **place reminders of important signposts** (from your timeline, written above) onto your personal calendar.
- ◆ Revise and modify the plan as necessary. The plan is not cast in concrete; it will need to be modified as you receive advice from your mentors and as circumstances or goals change. The challenge of implementation is to remain flexible and open to change.

Part 5: Repeat Parts 1-4 annually.

Now, set a date on next year's calendar when you will repeat this annual planning process and complete a new IDP!