

Name \_\_\_\_\_  
 Appointing Department \_\_\_\_\_  
 Appointment/Review Period \_\_\_\_\_ Review Due date \_\_\_\_\_

**I. FACE-TO-FACE REVIEW (Completed by mentor)**

1	Progress to date. Were expectations met?
2	What are the postdoctoral scholar's strengths?
3	In what areas does the postdoctoral scholar need to improve?
4	What is the postdoctoral scholar's potential for a research career in the discipline?

OVERALL RATING: Check one --->	<input type="checkbox"/> Unsatisfactory	<input type="checkbox"/> Satisfactory	<input type="checkbox"/> Excellent
-----------------------------------	-----------------------------------------	---------------------------------------	------------------------------------

Comments \_\_\_\_\_

**II. POSTDOCTORAL SCHOLAR'S RESPONSE OR COMMENTS (Completed by postdoctoral scholar)**

\_\_\_\_\_

If appointment will be continued, complete this section:

**III. REAPPOINTMENT (Completed by mentor)**

Training, research activities, and expectations for next year:  
 \_\_\_\_\_

Reappointment Period	Begin date	End date
----------------------	------------	----------

SALARY: Choose One -->	No change (based on dept or funding agency policy or unsatisfactory review)	Salary/stipend increase or merit per policy	Salary Increase Exception
---------------------------	-----------------------------------------------------------------------------	---------------------------------------------	---------------------------

Comments or details of salary recommendation:  
 \_\_\_\_\_

**SIGNATURES**

1. Postdoctoral Scholar \_\_\_\_\_ Date \_\_\_\_\_  
 2. Mentor \_\_\_\_\_ Date \_\_\_\_\_



University of California  
San Francisco

**UCSF Office of Career and Professional Development  
Individual Development Plan  
for  
Graduate Student and Postdoctoral Trainees**

---

**Individual Development Plans (IDPs)** provide a planning process that identifies both professional development needs and career objectives. Furthermore, IDPs can serve as a tool to help facilitate communication between trainees and their mentors.

**Goals**

An IDP can be one component of a broader mentoring program and can help trainees identify:

- Long-term career options they wish to pursue and the necessary tools to meet these goals
- Short-term needs for improving current performance

**Benefits**

Graduate student and postdoctoral trainees will have a process that assists them in developing long-term career goals. Additionally, identifying short-term (annual) goals will give them a clearer sense of expectations and help identify milestones along the way to achieving specific objectives. The IDP also provides a tool that can be used to provide structure to conversations between the trainee and the trainee’s mentor.

**Outline of the IDP Process**

The development, implementation and revision of the IDP require a series of steps to be conducted by the trainee, and then discussed with their mentor. These steps are an interactive effort, and ideally both the trainee and their mentor will fully participate in the process.

<b>Step 1</b>	Skills-assessment: Conduct an assessment of your strengths, weaknesses, career-related values and career-related interests; ask your mentor/colleague to also assess your strengths and weaknesses
<b>Step 2</b>	Career fit assessment: Assess your career goals match your skills, values and interests
<b>Step 3</b>	Completing the IDP: State your career goals and write your Annual IDP
<b>Step 4</b>	Implementing your IDP: Set an appointment with your mentor. Discuss your IDP with your mentor; implement the steps in your IDP; periodically review progress with your mentor.

---

**Prepared by:** Bill Lindstaedt, Director, Office of Career and Professional Development,  
bill.lindstaedt@ucsf.edu

**In preparing this document, the Office of Career and Professional Development acknowledges the substantial contributions of:**

- Phillip Clifford, PhD, Professor, Dept. of Anesthesiology and Physiology and Associate Dean for Postdoctoral Affairs, Medical College of Wisconsin
- Melanie Sinche, MS, Director of Postdoctoral Services, University of North Carolina
- Cynthia Fuhrmann, PhD, Program Director, Academic Career Development, UCSF Office of Career and Professional Development
- The Federation of American Societies of Experimental Biology (FASEB), Office of Public Affairs

# CREATING AND EXECUTING YOUR ANNUAL INDIVIDUAL DEVELOPMENT PLAN (IDP)

---

## STEP 1: SKILLS-ASSESSMENT

### Assess your strengths, weaknesses and skills – SELF-Evaluation

Evaluate your skills and abilities in the following areas where:

5 = Highly proficient

1 = Needs improvement

<b>Overall Core Scientific Knowledge</b>		1	2	3	4	5
	Knowledge area _____	1	2	3	4	5
	Knowledge area _____	1	2	3	4	5
	Knowledge area _____	1	2	3	4	5
<b>Laboratory or Bench Skills (eg, microscopy, animal skills):</b>						
	Skill set _____	1	2	3	4	5
	Skill set _____	1	2	3	4	5
	Skill set _____	1	2	3	4	5
	Efficiency and speed	1	2	3	4	5
<b>General Research Skills (eg, designing experiments, creativity):</b>						
	Designing experiments	1	2	3	4	5
	Analytical skills	1	2	3	4	5
	Problem solving/troubleshooting	1	2	3	4	5
	Creativity/developing new research directions	1	2	3	4	5
<b>Professional Skills:</b>						
	Oral presentation skills	1	2	3	4	5
	Grant writing skills	1	2	3	4	5
	Manuscript writing skills	1	2	3	4	5
	General scientific writing skills	1	2	3	4	5
	Teaching skills	1	2	3	4	5
<b>Leadership and Management Skills:</b>						
	Leading and motivating others	1	2	3	4	5
	Budgeting	1	2	3	4	5
	Managing projects and time	1	2	3	4	5
	Organizational skills	1	2	3	4	5
<b>Interpersonal Skills:</b>						
	Getting along with others	1	2	3	4	5
	Communicating clearly in writing	1	2	3	4	5
	Communicating clearly in conversation	1	2	3	4	5

## Assess your strengths, weaknesses and skills – MENTOR-Evaluation

Now ask your mentor or other trusted colleague to respond to the same items and return the list to you for discussion.

Please evaluate the skills and abilities of \_\_\_\_\_ in the following areas, where:

5 = Highly proficient

1 = Needs improvement

<b>Overall Core Scientific Knowledge</b>		1	2	3	4	5
	Knowledge area _____	1	2	3	4	5
	Knowledge area _____	1	2	3	4	5
	Knowledge area _____	1	2	3	4	5
<b>Laboratory or Bench Skills (eg, microscopy, animal skills):</b>						
	Skill set _____	1	2	3	4	5
	Skill set _____	1	2	3	4	5
	Skill set _____	1	2	3	4	5
	Efficiency and speed	1	2	3	4	5
<b>General Research Skills (eg, designing experiments, creativity):</b>						
	Designing experiments	1	2	3	4	5
	Analytical skills	1	2	3	4	5
	Problem solving/troubleshooting	1	2	3	4	5
	Creativity/developing new research directions	1	2	3	4	5
<b>Professional Skills:</b>						
	Oral presentation skills	1	2	3	4	5
	Grant writing skills	1	2	3	4	5
	Manuscript writing skills	1	2	3	4	5
	General scientific writing skills	1	2	3	4	5
	Teaching skills	1	2	3	4	5
<b>Leadership and Management Skills:</b>						
	Leading and motivating others	1	2	3	4	5
	Budgeting	1	2	3	4	5
	Managing projects and time	1	2	3	4	5
	Organizational skills	1	2	3	4	5
<b>Interpersonal Skills:</b>						
	Getting along with others	1	2	3	4	5
	Communicating clearly in writing	1	2	3	4	5
	Communicating clearly in conversation	1	2	3	4	5

## STEP 2: CAREER FIT ASSESSMENT

While Step 2 is useful for everyone to complete periodically, those graduate students and postdocs who are comfortable with and confident about their current career path may want to skip Step 2 some years. Others who may want to further consider their current career path or explore additional career paths should complete Step 2: Career Fit Assessment.

**Start by identifying your own “Career Fit Components.” In other words:**

- (A) Assess and reflect on your strengths, weaknesses and skills – this should include a self-assessment and an assessment by your mentor/colleague
- (B) Assess and reflect on your career-related values; and
- (C) Assess and reflect on your career-related interests.

**Then,**

- (D) Using your knowledge of these career fit components, you can more effectively **evaluate the fit** between your current career path and you strengths, weaknesses, skills, values and interests. This will help you determine whether your current career path is a good fit for you. If you wish to explore additional career paths, we include suggestions at the end of Step 2.

To help you get started with identifying your career fit components, complete the following exercises.

---

### **(A) Assess and reflect on your strengths, weaknesses and skills – this should include a self-assessment and an assessment by your mentor/colleague**

If you started with Step 1, you have already completed this part.

### **(B) Assess your career-related values: What factors are most important to you?**

Even if you feel confident about your future career goals, it’s a good idea to periodically assess your career related values. Why? So you that you can make sure that what’s important to you is consistent with what’s needed for success along that career path.

The following list describes a wide variety of satisfactions that people obtain from their chosen careers. Review each item on the list, reading each definition, and rate the degree of importance that you would assign to each item for yourself, using the scale below:

- 1 = Very important to my choice of career
- 2 = Reasonably important
- 3 = Not very but somewhat important
- 4 = Not important at all

RANK	VALUE	DESCRIPTION
	Help society:	Do something to contribute to the betterment of the world I live in.
	Help others:	Be involved in helping other people in a direct way either individually or in small groups.

People contact:	Have a lot of day-to-day contact with people as a result of my work activities; or collaboration with others; or teamwork.
Affiliation:	Be recognized as a member of a respected organization.
Friendships:	Develop close personal relationships with people as a result of my work activities; or have a job that allows time to maintain close friendships outside of work.
Competition:	Engage in activities that pit (or rank) my abilities or achievements against the abilities or achievements of others.
Make decisions:	Have power to decide courses of action, policies, etc.
Work under pressure:	Work in situations where time pressure is prevalent and/or the quality of my work is judged critically by supervisors, customers or others.
Power and authority:	Control the work activities of others people.
Influence people:	Be in a position to change attitudes or opinions of other people.
Work alone:	Work on or complete projects by myself, without any significant amount of contact with others.
Knowledge:	Engage myself in the pursuit of knowledge, truth and understanding; intellectual stimulation.
Intellectual or expert status:	Be regarded as a person of high intellectual prowess or as one who is an acknowledged expert in a given field.
Creativity:	Create new ideas, programs, organizational structures or anything else not following a format previously developed by others.
Aesthetics:	Be involved in studying, appreciating the beauty of things, ideas, etc. or in creating that beauty.
Supervision:	Having a job in which I am directly responsible for the work done by others.
Stability:	Have a work routine and job duties that are largely predictable and not likely to change over a long period of time.
Change and variety:	Have work responsibilities which frequently change their content and setting; avoidance of routine.
Precision work:	Work in a situation where there is very little tolerance for error.
Security:	Be assured of keeping my job and a reasonable financial reward.
Fast pace:	Work in circumstances where there is a high rate of activity and work must be done rapidly.
Recognition:	Be recognized (by individuals or co-workers or the public or bosses) for the quality of my work.
Excitement:	Experience a high degree of (or frequent) excitement in the course of my work.
Adventure:	Have work duties which involve risk-taking or trying new things; could be a position that allows a lot of travel.
Profit-gain:	Have strong likelihood of accumulating large amount of money or other material gain.
Independence:	Be able to determine the nature of my work without significant direction from others; not be required to do what others tell me to do.
Moral fulfillment:	Feel that my work is contributing significantly to, or is in keeping with, a set of moral standards which I feel are very important.

Location:	Find a place to live (town, area) which is conducive to my lifestyle and affords me the opportunity to do things I enjoy most.
Community:	Live in a town or city where I can get involved in community affairs.
Physical challenge:	Have a job that makes physical demands which I would find rewarding.
Time freedom:	Have work responsibilities which I can work at according to my own time schedule; flexible work schedule or no particular work schedule.
High earning anticipation:	Monetary rewards will be such that I am able to purchase those things I consider essential as well as the luxuries of life that I wish to have.
Status:	It is important the position I have carries respect with my friends, or my family, or some community of people.
Advancement:	A job that provides the opportunity to work hard and make rapid career advancement.
Challenging problems:	The position does not have to be “essential to the survival of the human race” but it should provide challenging problems to solve and the avoidance of continual routine.
Creative expression:	Opportunity to express in writing or verbally my ideas, reactions, and observations concerning my job and how I might improve it.
Job tranquility:	To avoid pressure and the “rat race”.
Family friendly:	A job or organization that allows me to blend family/work.
Work on the frontiers of knowledge:	a) Be involved directly in science and/or b) Work in an organization considered to be one of the best at striving for better product advances.
Exercise competence:	An opportunity to involve myself in those areas in which I feel I have talents greater than the average person.

**List the work-related values that are ranked as “1’s”**

**Do you feel that these items have changed from the last time you conducted a self-assessment? Changes might provide a topic for conversation between you and your mentor.**

**How will your current “next step career goal” and your current “long-term career goal” allow you to attain these values and satisfactions that are most important to you?**

**(C) Identifying career-related interests**

List the things you most like about your current position as a student or postdoc

List the things you like least about your current position as a student or postdoc

List the things that you would like to learn more about in the future (areas of scientific knowledge to get into and/or career paths that seem interesting, new bench skills to learn about, possible new directions for your research program)

Considering your long-term career goal, what have you learned about this career path that is particularly interesting to you?



**(D) Evaluate the fit between your current career path and your current “career fit components”**

Once you have identified your “career fit components” (your strengths, weaknesses, skills and abilities, and your work-related values), you need to be sure that the career paths you are considering constitute a good fit for those components.

Are you planning for a career as an independent academic research scientist? Do your “components” provide a good fit for this career path?

---

**If you are confident that the independent academic research path is for you, skip to Step 3 and clearly state that career goal under “My long-term career goal”**

---

If you think you might want to consider career paths other than independent academic research, what are those other career paths available to you and how might one or more of them better fit your “Career Fit Components”?

This step of the IDP process provides an ideal opportunity for you to conduct additional career-related research. If you believe that you should be considering a non-academic research science career path, your mentor may not know so much about your options. If you would like to find out more about the range of career options available to those with terminal degrees in the sciences (PhD or MD) here are some resources that you might want to review. As you explore these resources, think critically about how your “career fit components” fit the descriptions of the career paths available. Once you have identified one or more career paths that you feel may provide a match for your unique “career fit components”, make note of those paths and continue on to Step #3.

**Resource #1:** [www.sciencecareers.org](http://www.sciencecareers.org); click on “alternative careers” near the bottom of the left side menu. Then look for “Feature Index” listings, which are groups of articles organized around career paths, such as “Feature Index: Scientists as Medical Writers”, “Feature Index: Scientists as Management Consultants”, etc. More than 30 “Feature Index” listings exist, each representing a different career path available to PhD-level scientists.

**Resource #2:** A book titled “Alternative Careers in Science: Leaving the Ivory Tower” by Cynthia Robbins-Roth. Dr. Robbins-Roth’s book features 23 chapters, each providing information on a different career path available to PhD-level scientists.

**If you feel like you need help with this process, feel free to make an appointment with a career counselor in the Office of Career and Professional Development, 476-4986.**

### **STEP 3: WRITE AN Annual Individual Development Plan THAT INVOLVES EVALUATING YOUR PROGRESS DURING THE PAST YEAR AND SETTING GOALS FOR THE NEXT YEAR**

In Step 1 and Step 2 above, you have assessed your skills and other unique “career fit components” and completed any background research necessary to define your career goal.

**Now it is time to reflect on your progress toward this career goal and to outline how your training should move forward for you during the coming year. Fill out the Annual IDP below, which begins on page 10.**

Your IDP is a changing document, since needs and goals will almost certainly evolve during your time as a graduate student or postdoctoral fellow. The aim is to set clearly defined career goals, as you have just done. Then to help you reach those goals, your IDP will help you create an approach for building upon current strengths and skills over the next year while providing a plan for you to address areas where you still need further development.

The specific objectives of an Annual IDP are to:

- ◆ Create an annual plan for reaching your career goals
- ◆ Establish target dates for the completion of your postdoctoral appointment or your graduate degree. This will set a timeline for completion of the goals within your IDP.
- ◆ Set goals and sub-goals for the next year, including a discussion of how you will spend your time.
- ◆ Define in detail the approach you plan to take in order to obtain the specific skills and strengths needed (e.g., courses, technical skills, teaching, supervision) along with an anticipated time frames for obtaining those skills and strengths.

**Annual Individual Development Plan (IDP)**  
**for** \_\_\_\_\_  
(year)

\_\_\_\_\_  
(Your name)

Today's Date: \_\_\_\_\_

How many years have you been in this phase (graduate school or postdoc) of your training? \_\_\_\_\_

At this point, what month and year do you hope to finish your graduate degree or postdoctoral training? \_\_\_\_\_

What is your "Next Step Career Goal"?

\_\_\_\_\_

What is your "Long Term Career Goal"?

\_\_\_\_\_

What was listed as your "Next step Career Goal" last year? (skip if this is your first IDP)

\_\_\_\_\_

What were your main goals for the past year?

Which goals did you meet? If you did not meet a goal, why not?

**How do you spend your time?**

Provide a rough estimate of your time – what % of your time was spent on each of the following activities during the past year?

Research \_\_\_\_

Attending science seminars \_\_\_\_

Attending conferences \_\_\_\_

Teaching (in the classroom) \_\_\_\_

Mentoring (in the lab) \_\_\_\_

Reading in your field \_\_\_\_

Reading to expand your knowledge of other fields \_\_\_\_

Writing \_\_\_\_

Attending training/career development seminars/workshops \_\_\_\_

Volunteer or leadership \_\_\_\_

Networking/social activities \_\_\_\_

Job search activities (CV writing, informational interviewing, researching job opportunities) \_\_\_\_

**Development of Core Scientific Knowledge, General Research Skills and Laboratory Skills**

What further research-related skills do you need to acquire to be successful in this step of your career and in the next step? How will you gain exposure to those skills? How will you be certain that you have acquired competency in those skills?

In what areas do you want to acquire more scientific knowledge? In what areas do you need to do more reading? How much time do you think you will need to set aside (per week, per month, etc)

What experiments/projects do you plan to conduct during the next year? Are there experiments/projects that did not work in the past that you are continuing to pursue? How long are you willing to keep trying before you drop those experiments/projects? Are there more promising experiments/projects that you should be doing?

### **Professional Skills Development**

Oral presentation skills: What oral presentations do you plan to conduct in the next year (lab meetings, journal clubs, in-house seminars and scientific meetings, including poster sessions)? Are there specific presentation skills you would like to work on in the coming year? How will you work to develop better presentation skills and how will you know you have improved?

Scientific writing (grants, fellowships, manuscripts): Are there any writing projects that you will be continuing or initiating this year? Set goals for each stage within the writing process. If you need to improve your writing skills, what will you do (writing workshops, practice writing projects) and how will you know you have improved?

Teaching: What teaching or teaching training experiences do you plan to engage in this year? What areas of teaching do you need to improve? If you need to improve or need additional teaching experience, what will you do in the next year in this area and how will you know you improved?

### **Leadership, Management and Interpersonal Skills**

If your future career goal will require you to lead or manage people, resources or time, what specific skills do you need to acquire or improve in order to achieve your career goal? What will you do during the next year (training? reading?) to acquire or improve those skills?

Do you have the written and oral interpersonal communication skills necessary for success in your chosen career goal area? If "yes", how do you know? If "no" or "not sure" what will you do during the next year to improve your skills in these areas?The coming year:

**Career Development**

**Update your CV** and attach it to this document.

What will you do during the next year to learn more about the career path(s) that interest you?

Are there specific qualifications, skills or knowledge areas that you need to develop for this career path(s)?

**Goal Setting and Prioritizing:**

Overall, what goals will receive your top priority for the coming year? Create a timeline for fulfilling these goals?

#### **STEP 4: IMPLEMENT YOUR PLAN**

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!

- ◆ Put your plan into action. Read it over regularly to check your progress.
- ◆ Revise and modify the plan as necessary. The plan is not cast in concrete; it will need to be modified as circumstances and goals change. The challenge of implementation is to remain flexible and open to change.
- ◆ Plan to set an annual (or more frequently if appropriate) meeting with your mentor to review and discuss your IDP. Be sure to prepare a written outline for this discussion. For example, create a prioritized list of the most important items you wish to discuss.
- ◆ Revise the plan on the basis of these discussions.

# Individual Development Plan for Postdoctoral Fellows and Scholars

(modified from Vanderbilt University 1-2007)

The **Individual Development Plan (IDP)** provides a planning process that identifies annual progress, professional development needs, and career objectives for postdocs. The IDP serves as a communication tool between postdocs and their mentors. Each postdoc must complete and submit an IDP within six months of his or her initial appointment. Subsequently, each postdoc must complete and submit a renewed IDP at the time of annual reappointment (or every six months).

## Goals of the IDP

Help the postdoc identify:

- Short-term needs for improving current performance
- Long-term career goals and options and the necessary tools to meet these

## Benefits of the IDP

Identifying short-term goals will give postdocs a clearer sense of expectations and help identify milestones along the way to achieving specific objectives. Postdocs will have a process that assists in developing and achieving long-term career goals. The IDP provides a tool for communication between the postdoc and the mentor (PI).

## Outline of the IDP process

The development, implementation and revision of the IDP requires a series of step to be conducted by the postdoctoral fellow and the mentor. These steps are an interactive effort. Thus, both the postdoctoral fellow and the mentor must participate fully in the process.

## How to complete the IDP

Basic Steps	...For Postdoctoral Fellow	...For Mentor
Step 1	Write an IDP Share IDP with mentor and revise	Review IDP and help revise
Step 2	Implement the plan Revise IDP as needed	Establish regular progress review
Step 3	Survey opportunities with mentor	Discuss opportunities with postdoc

## Individual Development Plan for Postdoctoral Fellows and Scholars

### A. Information/Signatures

Name of Postdoctoral Fellow/Scholar: \_\_\_\_\_

Department: \_\_\_\_\_

Signature: \_\_\_\_\_ Date: \_\_\_\_\_

PI: \_\_\_\_\_

PI signature: \_\_\_\_\_ Date: \_\_\_\_\_

### B. Research Project(s)

- Describe the aims and experimental approaches of your current research project(s).

- What is the significance of your research?

## **C. Annual Progress Report**

- List or briefly describe major research accomplishments this year (do not include publications or presentations here):

- List new techniques/expertise acquired this year:

- List references for publications submitted or published this year. List references for abstracts that were presented at meetings. In each case, underline your name in the author list.

- List your funding source(s) and grants applied for this year. Describe your visa status if appropriate:

- List honor/awards received this year:





- Fellowship or other funding applications planned for the up-coming year. Describe your plans to alter your visa status if appropriate:

- Anticipated collaborations to establish in the up-coming year:

- Anticipated other professional training for the up-coming year (e.g. teaching, course work, etc.):

- How can your PI help you achieve your goals for the upcoming year? What do you want/need from your PI/mentor?

- [Question for Mentor] How can the postdoctoral fellow improve performance and achieve his/her goals for the upcoming year?

