Individual Development Plan for Postdoctoral Fellows

The IDP is a communication tool aimed at improving the mentoring relationship between postdocs and their faculty advisors. The IDP is a document, completed by the postdoctoral fellow and reviewed with his or her faculty mentor that defines both short- and long-term goals and how to achieve them. It is intended to cover not just scientific goals, but also career development with the hope that this will enable postdocs to become more proactive in their own career development.

This tool should be used in conjunction with Biomedical Postdoctoral Programs policies regarding postdoc and mentor obligations.

Each newly appointed postdoctoral fellow should complete an initial IDP within six months of appointment. Current postdoctoral fellows should file an IDP within 2 months before the next reappointment date. Annual review files MUST be kept confidential.

The specific goals of the review process are to:

♦ Encourage constructive dialogue between postdocs and their mentors
♦ Clarify responsibilities and performance expectations from both sides (mentor and the postdoc)
♦ Record information about performance and accomplishments and promote more effective performance
♦ Provide postdocs with feedback on their performance and accomplishments during the previous year/review period
♦ Identify goals for the upcoming year and specific plans to help postdocs meet those goals

Goals of IDP

The IDP is a changing document, since needs and goals will almost certainly evolve over time as a postdoc. The specific objectives of a typical IDP are to:

✔ Establish effective dates for the duration of his or her postdoctoral appointment – maximum of 5 yrs at Penn
✔ Identify specific skills and strengths that he or she needs to develop (based on discussions with the mentor).
✔ Define the approaches to obtain the specific skills and strengths (e.g., courses, technical skills, teaching, and supervision) together with anticipated time frames.
✔ Discussion of the draft IDP with the mentor.
✔ Revise the IDP as appropriate.
Outline of the IDP process

The development, implementation and revision of the IDP require a series of steps 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.

<table>
<thead>
<tr>
<th>Basic Steps</th>
<th>For Postdoctoral Fellows</th>
<th>For Mentors</th>
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<tbody>
<tr>
<td><strong>Step 1:</strong></td>
<td>➤ Conduct a self assessment</td>
<td>➤ Become familiar with available opportunities</td>
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<td><strong>Step 2:</strong></td>
<td>➤ Survey opportunities with mentor</td>
<td>➤ Discuss opportunities with postdoc</td>
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</table>
| **Step 3:** | ➤ Write an IDP  
➤ Share IDP with mentor and revise | ➤ Review IDP and help revise |
| **Step 4:** | ➤ Implement the plan  
➤ Revise the IDP as needed | ➤ Establish regular review of progress  
➤ Help revise the IDP as needed |

**Postdoctoral Fellows**

**Conduct a Self-Assessment**

Assess your skills, strengths and areas that need development. Formal assessment tools can be helpful.

Take a realistic look at your current abilities. This is a critical part of career planning. Ask your peers, mentors, family and friends what they see as your strengths and your development needs.

Outline your long-term career objectives. Ask yourself:

- What type of work would I like to be doing?
- Where would I like to be in an organization?
- What is important to me in a career?
Mentors

Step 1. Become Familiar with Available Opportunities
By virtue of your experience you should already have knowledge of some career opportunities, but you may want to familiarize yourself with other career opportunities and trends in job opportunities (refer to sources such as National Research Council reports and Science career reviews).

Step 2. Discuss Opportunities with Postdoc
This needs to be a private, scheduled meeting distinct from regular research-specific meetings. There should be adequate time set aside for an open and honest discussion.

Step 3. Review IDP and Help Revise
Provide honest feedback - both positive and negative - to help postdoctoral fellows set realistic goals. Agree on a development plan that will allow postdoctoral fellows to be productive in the laboratory and adequately prepare them for their chosen career.

Part One: To be reviewed by Mentor and Postdoc

Obligations of Postdoctoral Fellows
From the Policy for Postdoctoral Fellows at the University of Pennsylvania (Almanac 2004)
Postdoctoral fellows have certain obligations to their mentor, the group in which they are working, the Department with which they are associated, the sponsor whose funds support them, and the University. These obligations include but are not limited to: (i) the conscientious discharge of their research, scholarly, and teaching responsibilities, as applicable; (ii) conformity with ethical standards in research and scholarship; (iii) compliance with good scholarly practice including the maintenance of adequate research records; (iv) observation of appropriate guidelines regarding human subjects and due observation of University standards regarding use of isotopes, chemicals, infectious agents, animals, and the like, if applicable; (v) open and timely discussion with their mentor regarding possession or distribution of tangible property such as materials, reagents, and the like; (vi) discussion of laboratory records or scholarly materials, if relevant; (vii) prior disclosure of appropriate scholarly information, findings or techniques proposed for dissemination privately, at scholarly meetings, or in publications; (viii) collegial conduct towards coworkers and members of the academic or research group; (ix) compliance with all applicable University policies.

Obligations of Mentors
From the Policy for Postdoctoral Fellows at the University of Pennsylvania (Almanac 2004)
Mentors’ responsibilities include: (i) developing in consultation with the PDF a mutually satisfactory research project or scholarly program; (ii) encouraging PDFs to present their work, both inside and
outside the university, and to publish their results in a timely fashion; (iii) encouraging PDs to acquire and enhance their knowledge and technical skills as dictated by their current and future needs; (iv) arrangement and oversight of teaching opportunities as appropriate to their discipline and program; (v) encouraging PDs to apply for training and research support as appropriate; (vi) meeting regularly with their PDs to discuss progress in their research; (vii) providing an annual review of performance; (viii) insuring that PDs are aware of University policies regarding postdoctoral training, and are instructed about research policies of the University; (ix) providing career counseling.

Career Development Guidelines

*Mentors should encourage postdocs to:*

1. Manage their own project, which should lead to a first author publication.
2. Learn ancillary skills, e.g. writing, public speaking, networking, etc.
3. Write or assist in writing papers.
4. Apply for extramural support (e.g. NRSA postdoctoral fellowships, career development awards, private foundation fellowships, etc. within the 5 year timeline)
5. Participate in the review of journal articles and other publications.
Part Two: Postdoc Review Form

Postdoc Name: _____________________ Signature: _____________________ Date: __________
Department: ________________________
Mentor: ____________________________ Signature: _____________________ Date: __________
Appointment Date: __________ Review Date: __________
Department Chair Signature: ____________________________ Date: __________

Research Skills
Creativity/developing new research directions  NA  A  B  C  D
Experimental design and critical evaluation of data  NA  A  B  C  D
Review and evaluation of scientific literature  NA  A  B  C  D
Problem solving/troubleshooting  NA  A  B  C  D
Statistical analysis  NA  A  B  C  D
Computer skills
   A. General (Office, Adobe etc.)  NA  A  B  C  D
   B. Data analysis software (Flow-Jo, Graph Pad Prism, Sigma Plot etc.)  NA  A  B  C  D
Skills specific to your field (e.g. cell culture, spectroscopy, Mol bio methods)  NA  A  B  C  D
Lab records and data management  NA  A  B  C  D

Professional Skills
Oral presentation skills  NA  A  B  C  D
Manuscript writing skills  NA  A  B  C  D
Grant/fellowship writing skills  NA  A  B  C  D
Teaching skills (in a classroom)  NA  A  B  C  D
Teaching skills (one-on-one)  NA  A  B  C  D
Identifying mentors and utilizing them effectively  NA  A  B  C  D
Mentoring others  NA  A  B  C  D

Time Management
Meeting deadlines  NA  A  B  C  D
Establishing priorities within your schedule  NA  A  B  C  D
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<tr>
<th>Skill</th>
<th>NA</th>
<th>A</th>
<th>B</th>
<th>C</th>
<th>D</th>
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<td>Working efficiently</td>
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<td>Organizing skills</td>
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<td>Flexibility and multitasking</td>
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<td>Interpersonal Skills</td>
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<td>Reliability; following through on commitments</td>
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<td>Communicating effectively in written correspondence</td>
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<td>Communicating effectively in conversation</td>
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<td>English proficiency – spoken and/or written</td>
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<td>Ability to give and receive constructive feedback</td>
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<td>Networking/meeting new colleagues</td>
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<td>Collaboration/ Ability to work in a team</td>
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<td>Collegiality/helpfulness towards others</td>
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<td>Management and Leadership Skills</td>
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<td>Independent management of own research project</td>
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<td>Developing/managing budgets</td>
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<td>Chairing a meeting</td>
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<td>Establishing priorities for a team</td>
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<td>Delegating responsibility</td>
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<td>Leading and motivating others</td>
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<td>Supervising/managing people</td>
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<td>Working within an organization</td>
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N/A: not applicable, A as highest grade and D being the lowest.

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 improve* in order to be successful in your current position or future career path.

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

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

____________________________________________________________________________________
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Has the postdoc completed/attended any **Core** or **Optional** elements of the Postdoctoral Training Program?

**Core Elements:**

____________________________________________________________________________________
____________________________________________________________________________________

**Optional Elements:**

____________________________________________________________________________________
Setting Goals: Research projects

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.

____________________________________________________________________________________
____________________________________________________________________________________
____________________________________________________________________________________

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?

____________________________________________________________________________________
____________________________________________________________________________________
____________________________________________________________________________________

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?

____________________________________________________________________________________
____________________________________________________________________________________
____________________________________________________________________________________

What professional development activities/opportunities (e.g., training, conferences, special projects, etc.) would you like to pursue during the next review cycle that would enhance your performance and skill development?

____________________________________________________________________________________
____________________________________________________________________________________
____________________________________________________________________________________

Who is your secondary mentor(s)?

____________________________________________________________________________________
____________________________________________________________________________________

What month and year do you hope to finish this stage of your training?

____________________________________________________________________________________
Part Three: To be completed by Mentor and Postdoc

Goals for Next Review Cycle
Goals, Projects and Responsibilities that were mutually discussed and selected for the next review period

<table>
<thead>
<tr>
<th>Goal/Project/Responsibility</th>
<th>Expected Outcome</th>
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Future Career Development
Professional development activities/opportunities (e.g., trainings, conferences, special projects, etc.) planned for the next review period

<table>
<thead>
<tr>
<th>Training/Conference/Opportunity</th>
<th>Date</th>
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Mentor Signature ____________________________ Date: ____________

Postdoc Signature ____________________________ Date: ____________
Intramural Postdoctoral Training Program

Core Elements

1. Bioethics Training – RCR Training
2. Chemical Hygiene, Environmental Health and Radiation Safety Training
4. Human Subject Research Training *
5. Public Seminar on Research
6. Competency in Scientific Writing
7. Regular Attendance at Seminars

*Individuals not conducting animal or human subject research are exempt from this training.

Optional Elements (below are few examples)

1. Research Success Skills
   a. Peer Review
   b. Scientific Writing
   c. Grant Writing/Obtaining Grant Funding
   d. Public Speaking
   e. Establishing/Managing a Lab

2. Continuing Education
   a. Coursework
   b. Conference Attendance
   c. Specialized Technique Training

3. Career Guidance
   a. Career success skills workshops
   b. Career Advising and Programming
   c. Biomedical Career Fair

4. Career Development Opportunities (i.e. Internships in technology transfer, business planning, or Bioethics; Teaching opportunities, etc.)

See the Training page for a more detailed description of training elements on-line at www.med.upenn.edu/postdoc.