



Postdoc name:  Mentor name:  Date:

## Individual Development Plan (Alternative Annual Meeting Form)

---

This form was developed with the following use in mind:

1. The exercise works best if the meetings occur at the same **pre-determined time in the calendar each year**. For situations where postdocs have regular, pre-scheduled meetings with their mentor, simply allocating the first meeting of the new year (January) for this purpose becomes an easy, low-stress way of coming up with a meeting. For those who meet with postdoc ad hoc, a simple request that the postdoc schedule a meeting for “sometime early in the month of January” may be a reasonable request. Early January works particularly well because it is a time when people are often in a “change” mindset.
2. The form is intended: (1) to help the postdoc and her/his mentor take stock of the past year’s accomplishments/progress; (2) to discuss future plans; and (3) to determine a strategy for realizing those plans.
3. The postdoc completes the form and ideally returns it to the mentor.
4. The mentor reviews the form before the meeting and considers what things s/he would like to focus on in the conversation.
5. At the meeting, the CV is reviewed (part one of the form requests such to be attached) and then the mentoring form is gone through, point by point. This use of the forms as a “script” accomplishes two major objectives: (1) it ensures that all points are covered and (2) it means that possibly awkward topics are not avoided and can be broached because they are simply “next” on the list. This allows both mentor and postdoc to raise difficult items without implying that they are major issues and without seeming unduly critical.
6. The final section of the form is a series of talking points where the mentor can be sure to raise anything not already discussed with special emphasis on **areas where the postdoc should focus to improve her/his career prospects**.
7. At the end of the meeting, the form is destroyed or returned to the postdoc. The mentor might want to make notes, but it is **not** intended that a copy of the form be put into a postdoc’s “file” or become a permanent part of her/his record. To the extent such documentation might be needed (e.g., as a prelude to possible dismissal or disciplinary action), that should be handled separately – otherwise, the tone of the meeting moves away from the supportive and desired one of being **“all about the postdoc”** and instead becomes a bureaucratic or worse, antagonistic exercise.

*Note: Postdocs are asked to complete parts 1-4 prior to meeting with the research mentor.*



## Part I. Curriculum Vitae: Please attach a copy of your current Curriculum Vitae

## Part II. Progress review: research and professional training in the past year

1. Brief overview of your major research progress in the past year:

2. Brief overview of your activities and other recognition/accomplishments in the past year (e.g., publications, patents, honors or awards, teaching experiences, presentations at professional meetings, grants or fellowships):

3. Describe any research efforts or goals in which you have experienced or are experiencing unusual or unanticipated difficulties. What factors caused or contributed to these difficulties? What assistance, resources, or mentoring might help you in better accomplishing your research goals?

4. Clinical activities in the past year (if applicable):



## Part III. Plans for the future: career goals and progress

---

1. Current career goal(s):

A.

B.

2. What are the primary factors driving your career goals, plans, and decisions (e.g., interests in research, teaching, business, government, writing; geographic priorities; family commitments; financial objectives; international trainee with an assured position in home country, etc.)?

3. What steps are you taking to enhance your ability to attain these goals?



4. What additional training or skills would most benefit you in preparing for your next role?

5. When do you anticipate beginning a job search?

6. How can your mentor best support you in reaching your career goals?



## Part IV. Plans for the coming year: research and training goals

---

1. Please describe the goals for your research project in the coming year:

2. Anticipated publications (indicate planned title, journal and approx. submission date for each):

3. Desired meeting or workshop attendance:

4. Fellowship or other funding applications planned (indicate name of award, due date):



5. Other professional training (course work, teaching activities):

6. What can your mentor do differently to best support you in reaching your immediate research and training goals?



## Part V. Final talking points for discussion

---

- Research progress
- Timeframe for completing this training experience
- Career plans
- Areas/aspects for postdoc to focus on in coming year to improve career prospects