

Individual Development Plan (IDP) and Establishing Shared Mentoring Expectations (page limit: 8 pages)

Introduction to IDP and Establishing Shared Mentoring Expectations.

From “You Need a Game Plan”, *Science*, 2012 (10.1126/science.caredit.a1200100)

Research has found that people who develop and implement strategies to pursue career-specific goals achieve greater career success as measured by salary, promotions, and level of responsibility.¹ They also report greater career satisfaction and rate themselves as more successful than their peers compared to those without career plans.² A nationwide study of 7600 postdoctoral researchers found that postdocs who developed training plans with their advisers at the start of their appointments reported greater satisfaction, published more papers, and experienced fewer conflicts with those advisers.³

TRDRP requires each applicant for a predoctoral or postdoctoral award to submit an Individual Development Plan (IDP) and Shared Mentoring Expectations form as part of their application materials. Please use this template as a guide.

The first portion of this document is an IDP while the second portion consists of an Establishing Shared Mentoring Expectations form. These tools are designed to help you get the most out of your training experience. When completing the IDP, be honest with your answers and incorporate flexibility to make sure your plan is realistic and achievable. More resources for creating IDPs can be found [here](#). The Establishing Shared Mentoring Expectations form is useful in establishing expectations between mentors and mentees which is key for a productive training environment. Both forms may be adapted to meet your needs or to be relevant to your discipline.

If your application is selected for funding, you and your mentor will update your IDP and submit it with your progress report each year. The information provided is meant to guide mentorship and trainee development and should serve as guidelines for structured interactions while allowing for flexibility, since needs often change in mentor-mentee relationships.

This IDP template was adapted from those used by Purdue University, Brown University, Duke University, the University of California, Davis, and Vanderbilt University. Establishing Shared Mentoring Expectations form was adapted from a form used by University of Michigan.

NOTE: these templates are fillable PDFs. Boxes are static; only text that is visible in the boxes will be captured. Use the “print to PDF” function when saving your final version. TRDRP recommends previewing the PDFs prior to submission.

¹ Ng T. W. H, Eby L. T., Sorensen K. L., and Feldman D. C. (2005). "Predictors of objective and subjective career success: A meta-analysis." *Personnel Psychology*, 58, 367–408.

² Abele A. E. and Wiese B. S. (2008). "The nomological network of self-management strategies and career success." *Journal of Occupational and Organizational Psychology*, 81, 733-749.

³ Davis G. (2005). "Doctors Without Orders." *American Scientist*, 93 (3), supplement 1-13.

Individual Development Plan (NOTE: only text that fits in the boxes will be captured)

Part 1. Trainee and Mentor Information

Name of Trainee: _____

Department or Program: _____

Year in training at the institution: _____

Primary Mentor Name: _____

Part 2. Goals

2.1. Research Progress

1. What is the major focus/goal(s) of your research project/dissertation?

2. For Predocs: List your dissertation committee members.

3. For Postdocs: List the members of your mentoring team.

Predoctoral Only

1. Have you completed your course work? ☐ Yes ☐ No

- a. If not, what are your remaining courses and a timeline for completion?

2. Have you advanced to PhD Candidacy? ☐ Yes ☐ No

- a. If yes, what date did you advance to candidacy?

If not, what is your target date and how will you prepare?

4. Final Dissertation Defense (check one): ☐ Planned ☐ Completed

a. Date completed or target date: What steps are needed to defend your dissertation?

2.2. Short-Term Goals (all trainees)

1. In the upcoming year what research products do you plan to submit? (Research products include peer-reviewed publications, presentations, health assessments, agency reports, and/or other gray literature)

2. In the upcoming year what meetings, conferences, and workshops do you plan to attend? What are the deadlines for abstracts? What awards or travel funds are available that you could apply for to assist with your travel?

3. In the upcoming year which career or professional training activities do you plan to participate in?

4. In the upcoming year, how will you grow your knowledge about the intersection of tobacco control with your research topic (e.g., attend a specific seminar, read and discuss a specific publication, attend a TEROC meeting)

6. In the upcoming year, what concrete steps will you take to engage with community members outside of academia (e.g., Statewide Tobacco Prevention Coordinating Centers)?

7. What is the next step in your career path (postdoctoral training, research job, internship, etc.)?
What is your timeline for searching for your next position?

8. How can your mentor assist you in achieving your short-term goals?

2.3. Long-Term Goals

1. What is your long-term career goal?

2. What training is required to assist you in preparing for this long-term career goal?

4. How will your short-term goals (section 2.2) assist you in achieving this long-term career goal?

5. How can your mentor assist you in achieving your long-term goals (including identifying sources of funding)?

Establishing Shared Mentor Expectations

Please complete this form together with your mentor to help you establish shared expectations for your mentor/mentee relationships. NOTE: only text that fits in the boxes will be captured.

1. **Getting the mentoring you need.** A mentoring network includes academic (for example, advising, research, substantive feedback), professional (career guidance, intellectual community), and well-being (personal and emotional) support. Which of these areas will we work on together?

2. **Communication.** What is the best way/technology to get hold of each other? What is the appropriate timeframe to expect a response? When are we typically unable to respond?

- a. When we meet, is an agenda required, how long will the meeting be?

- b. If we have conflicts or disagreements, how will we address those?

3. **Trainee's Professional Responsibilities.** Describe the trainee's primary area(s) of responsibility and expectations (for example, reading peer-reviewed literature, in-person working hours, and teaching).

4. **Participation in Group Meetings (if relevant).** Trainee will participate in the following ongoing research group meetings. What does this participation look like?

5. **Tentative Scientific Products on Which Trainee Will Be an Author or Coauthor.** Discuss disciplinary norms around authorship; list the publications and the likely order of trainee's authorship.

6. **Opportunities for Feedback.** Are there specific areas in which the trainee would like feedback? In what form and how often can the trainee expect to receive feedback regarding overall progress and other professional activities? How much lead time does the mentor need to provide feedback on written work, such as chapter and publication drafts?

7. **Professional Meeting(s) That the Trainee Will Attend and Dates.** What funding is available to attend these meetings?

8. **Networking Opportunities.** Discuss additional opportunities to network (for example, meeting with seminar speakers, et cetera).

9. **Time Away from Campus.** Discuss expectations for planned time away (vacations, holidays, family obligations, etc.) as well as unplanned absences (illness, personal emergencies, etc.). What are the preferred modes and timelines for notifying each other about these absences? How will the mentor and trainee work together to manage responsibilities during absences while maintaining flexibility and well-being?

10. **Funding.** Discuss the funding for the research group and plans for future funding (for example, internal and external fellowships, including, training grants, assistantships); discuss any uncertainty in future sources of funding, and contingencies.

11. **Resources and Support.** What mentoring and related resources should the trainee be leveraging (for example, departmental, other faculty, wellness/mental health resources)? What resources or support should be explored to work more effectively and have a greater impact on career development

12. **Other Areas.** List here any other areas of understanding between the trainee and mentor regarding working relationship during the trainee's tenure. For example, if approved to work hybrid or remotely, what strategies will be put in place to ensure ongoing communication and support between mentor and trainee?

Verification of Completion

Annual Individual Development Plan and Shared Mentoring Expectations Form

Primary Mentor Printed Name

Trainee Printed Name

Primary Mentor Signature

Trainee Signature

Date

Date