



CTSI

Mentee: _____ Academic Series: _____
 Primary Mentor: _____ Date of Meeting: _____
 Secondary Mentor: _____ Report # _____
 Other mentors (Department Mentor Facilitator): _____
 (Personal Mentor) : _____

Review CV: What is required for promotion in your series and in your department? Are you on track for promotion? Have you met with your Chair?

You are about to apply for a merit or promotion. What are the accomplishments and activities that you want your Director/Mentor to be able to write about in a letter of recommendation?

5-year Goal #1 (Personal Career)

- Educational Activity
- Research Project
- Product
- Date

6-month objectives:

- 1.
- 2.
- 3.

5-year Goal #2 (Research population/outcomes)

6-month objectives:

- 1.
- 2.
- 3.

5-year Goal #3 (Research methods)

6-month objectives:

- 1.
- 2.
- 3.

Date: _____

Research Projects (complete this in preparation for meeting with mentor and provide mentor with copy)

- A. In Development (project names)
 - Collaborators & Staff
 - Brief overview/ timeline
 - Grants in preparation:
- B. Active Research
 1. Data collection/analysis (project names)
 2. Abstracts in preparation (abstract titles)
 3. Manuscripts in preparation (titles)

DATE FOR NEXT MEETING WITH MENTOR: _____
INSTRUCTIONS FOR INDIVIDUAL MENTORING DEVELOPMENT PLAN (IMDP)

CAREER GOALS

On page 1 of the IMDP, succinctly list your goals for the next 5 years:

Goal #1. Personal career

This should reflect a leadership or administrative title you see yourself holding in 5-10 years, such as Director of a Program or Center, or Chair of a Department. For example, a personal career goal could be: "To lead a multidisciplinary Center for Human Genetics." Consider the translational impact of your goals.

Goal #2. Research population and outcome

This should relate to a global vision of how your research will ultimately improve human health. The focus should be on the clinical population and health outcome(s). For example, one research goal could be: "To improve the quality of life for men with prostate cancer." Consider the translational impact of your research goal.

Goal #3. Research methods

This should relate to design and methods rather than the patient population of interest. For example, one goal could be: "To reduce health care costs through the application of cost-effectiveness analyses." Consider how your mentor(s) can facilitate this goal.

CAREER OBJECTIVES For each Goal, succinctly list 2-3 objectives that, when met, will result in achieving your goal. These objectives are typically related to a "milestone" such as Promotion/Tenure, an R01 or K award, or appointment to a prestigious national scientific society or committee.

EDUCATIONAL ACTIVITIES For each objective, indicate any educational/training activity you will engage in to help meet that objective.

RESEARCH PROJECTS For each objective, indicate any research/scholarly activity that will help you meet that objective.

PRODUCTS & DATES For each objective, indicate what individual products (abstracts, publications, grant proposals, presentations) are expected to contribute to your ability to achieve that objective. Also indicate the general date expected to accomplish this product.

Guiding Questions to Assess Your Challenges and Support:

1. What challenges or obstacles must you address?
2. What steps can you and your mentor(s) identify for overcoming them?
3. Is there anything or anyone that will influence completion of your objective(s)?
4. Where can you find feedback, support and resources? An example might include a tendency to procrastinate, and the need to commit to the project. One step would be to inform your mentor and supervisor and be more accountable. Another example might be lack of travel support to a conference and exploring financial support with your mentor or supervisor.
5. Are there personal issues at work or home that need to be addressed?
 - Work: Any problems with financial/administrative issues, colleagues, resources, etc.?
 - Home: Are there any problems at home that someone can help with? How is your quality of life?

Page 2 of the IMDP can provide a working document for current/planned activities as well as time lines. The first 2 pages serve as an initial IMDP.

The following 3 pages serve as an IMDP progress report. You and your mentor should decide on the frequency of these progress reports. You may want to initially consider every 3 months and move to every 6 months if everything is going well and according to plan. If there are unanticipated challenges that arise, you may want to meet every month or every three months depending on your percent effort in other areas.

IMDP PROGRESS REPORTS

Date: _____

BEFORE THE NEXT MEETING WITH YOUR MENTOR: Review your progress every 1-2 months below.
What have you learned so far? What has changed and how should you amend your IMDP?

MENTOR'S 6- MONTH SUMMARY

Date: _____

There is often a need to identify the resources available to you, and see where the demands on your time and energy are focused. Your mentor(s) can help you see where these resources and demands can be re-directed.

Resources: List financial, staff, laboratory, clinical and space resources provided by any of your mentors or department: (List type, and \$\$\$ available if applicable)

Professional Development: List courses, seminars, conferences or training taken this year. Are they meeting your needs? If not, what else would be helpful?

Clinical Duties: ____% effort. Is this sufficient for maintaining clinical skills?
Is it interfering with research productivity?

Teaching Duties: ____% effort. Is this sufficient for developing multidisciplinary academic skills?
Is it interfering with research productivity?

Administration & Service: Is this sufficient for developing your leadership skills?
Is it interfering with research productivity?

Other [Personal] issues: (These should be addressed, but not necessarily documented)

Activity:

Research (direct research, presenting, publishing, grant writing, peer reviewer)

ACTUAL for academic year: ____% _____ Hrs/Mo

IDEAL: ____% _____ Hrs/Mo

ON TRACK? ____ Yes ____ No* ____ Don't Know

Clinical (direct patient care, Clinical competence)

ACTUAL for academic year: ____% _____ Hrs/Mo

IDEAL: ____% _____ Hrs/Mo

ON TRACK? ____ Yes ____ No* ____ Don't Know

Education (direct teaching, Curriculum development, Teaching tools)

ACTUAL for academic year: ____% _____ Hrs/Mo

IDEAL: ____% _____ Hrs/Mo

ON TRACK? ____ Yes ____ No* ____ Don't Know

Professional Development (training, coursework, professional associations)

ACTUAL for academic year: ____% _____ Hrs/Mo

IDEAL: ____% _____ Hrs/Mo

ON TRACK? ____ Yes ____ No* ____ Don't Know

Administration (governance of program, dept, school, committee)

ACTUAL for academic year: ____% _____ Hrs/Mo

IDEAL: ____% _____ Hrs/Mo

ON TRACK? ____ Yes ____ No* ____ Don't Know

Service/Citizenship (Dept, School, Campus, Community volunteer work)

ACTUAL for academic year: ____% _____ Hrs/Mo

IDEAL: ____% _____ Hrs/Mo

ON TRACK? ____ Yes ____ No* ____ Don't Know

TOTAL DUTIES: 100% _____ Hrs/Mo

*What specific action-oriented steps can you take to put yourself back on track to achieve your long-term goal?
Who can help you if you are stuck? _____

During the semi-annual meeting with your mentor, discuss the following issues:

- 1 What were the 2 biggest barriers to accomplishing your goals last year (be specific) and what specific actions will you plan to take (especially if not on track in one or more areas)?

Barrier _____
Plan of Action

Barrier _____
Plan of Action

- 2 What made your professional life more successful last year (be specific)?
- 3 From your experience, what would you suggest that someone like yourself be aware of when entering this system?
- 4 What are your short-term goals for next year (____ to ____).
Mo/Yr Mo/Yr
When is your next scheduled meeting? Date: _____
- 5 Other Comments:

Background Information about Individual Development Plans (IDPs) For Mentors and Mentees¹

An IDP provides a process to identify career goals and objectives. It serves as a communication tool between mentee and mentor.

Goals of an IDP: Help individuals identify:

- Long-term career options for a mentee to pursue and how to best pursue these options, and
- Short-term need for improving current performance.

Benefits: A clearer sense of expectations and milestones to achieve and advance in the system.

The IDP Process: These 4 steps are meant to be interactive; both mentee and mentor must participate fully in the process:

The Mentee:

Step 1. Conduct a Self-Assessment.

- Assess your skills, strengths and areas which need development.
- 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:
 - 1) What type of work would I like to be doing?
 - 2) Where would I like to be in this organization?
 - 3) What is important to me in a career?

Step 2. Survey Opportunities with Mentor.

- Identify career opportunities and select from those that interest you.
- Identify developmental needs by comparing current skills and strengths with those needed for your career choice.
- Prioritize your developmental areas and discuss how these should be addressed with mentor.

Step 3. Write an IDP.

An IDP maps out your general path and helps match skills/strengths to your career choices. It is a changing document; needs and goals will almost certainly evolve over time. The aim is to build from your current strengths and skills by identifying areas for development and providing a way to address these.

- Discuss your draft IMDP with your mentor(s).
- Revise the IMDP as appropriate.

Step 4. Implement Your IDP.

- Put your plan into action.
- Revise and modify plan as necessary; it is not cast in stone and needs to be modified as circumstances and goals change. The challenge is to be flexible and open to change.
- Review the plan with your mentor regularly. Revise the plan on the basis of these discussions.

The Mentor:

Step 1. Become familiar with available opportunities.

By virtue of your experience you should already have knowledge of the mentee's career opportunities, but you may want to familiarize yourself with other career opportunities and trends in job opportunities

Step 2. Discuss opportunities with mentee.

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 mentee set realistic goals. Agree on a development plan that will allow your mentee to be productive in the research and adequately prepared for the next step in their career advancement.

Step 4. Establish regular review of progress.

A mentor should meet at regular intervals with mentee to assess progress, expectations and changing goals. Every 6 months, you should conduct a performance review to assess accomplishments and what needs to be done next. A written review is most helpful in objectively documenting accomplishments.

See [Rewards and Challenges of Being a Mentor](#) and [UCSF Mentoring Tool Kit](#)

¹ Adapted from: Office of Public Affairs, Federation of American Societies for Experimental Biology (FASEB), Science Policy Committee. [Individual Development Plan for Postdoctoral Fellows](#) and [Sample Annual Review](#)

Rewards of Being a Good Mentor²

The primary motivation to be a mentor was well understood by Homer: the natural human desire to share knowledge and experience. Some other reasons for being a good mentor:

1. Achieve satisfaction. For some mentors, their greatest joy is having a mentee succeed and eventually become a friend and colleague.
2. Attract good colleagues. The best mentors are most likely to be able to recruit -and keep - colleagues of high caliber who can help produce better research, papers, grant proposals, and health for the population.
3. Stay on top of your field. There is no better way to keep sharp professionally than to coach junior colleagues.
4. Develop your professional network. In making contacts for your mentee, you strengthen your own contacts and make new ones.
5. Extend your contribution. The results of good mentoring live after you, as new continue to contribute even after you have retired.

² Adapted from: Handelsman J, Pfund C, Lauffer SM, Pribbenow CM. Entering Mentoring: A Seminar to train a new generation of scientists. Session 3, p. 41-48 and Session 5, p. 67-69. [Wisconsin Program for Scientific Teaching](#).

The Challenges of Being a Mentor³

Which is the most challenging aspect of your mentoring role? Choose one and discuss this with your mentee at your semi-annual progress report meetings.

1. _____ Assessing mentee's background (knowledge and skills)
2. _____ Dealing with mentee's inexperience (knowledge and skills)
3. _____ Keeping mentee engaged
4. _____ Allocating time
5. _____ Finding resources
6. _____ Identifying mentee's motivation
7. _____ Remaining patient
8. _____ Addressing mentee's misconceptions about science
9. _____ Setting reasonable goals for the project
10. _____ Building mentee's confidence
11. _____ Fostering mentee's independence
12. _____ Deciding on the best solution to a given mentoring challenge
13. _____ Other: _____

³ Handelsman J, Pfund C, Lauffer SM, Pribbenow CM. Entering Mentoring: A Seminar to train a new generation of scientists. [Wisconsin Program for Scientific Teaching](#). Section 8 "Entering Mentoring: Training Scientist Mentors" page 122)