

Guidance & Tools for Annual Planning Meeting

The Individual Development Plan (IDP) is a mentoring tool that links research goals with career development and progress towards independence. It is meant to foster an ongoing and recurring discussion that involves evaluation, goal setting and feedback with input from both postdoc and PI. While the NIH encourages the use of IDPs for graduate students and postdoctoral researchers supported by NIH awards, HMS supports its implementation for all postdoctoral fellows, regardless of funding source.

The following IDP template provides an open framework that can facilitate an annual planning meeting between the postdoc and PI that addresses research and professional progress. This document should be filled out by both parties beforehand and discussed during the meeting.

Section I outlines major topics of discussion, benchmarks advancement, and identifies real or potential barriers to success along the training path. The Feedback element allows for the PI to evaluate trainee performance and progress while letting the postdoc assess issues related to research, training, or mentoring.

Section II is a calendar for the upcoming year that allows for research and career development goals to be outlined and organized.

Step 1: Postdoc and PI should complete Sections I & II separately. The postdoc should provide this form and an updated CV to the PI in advance of scheduling the meeting.

Step 2: Meet and discuss Sections I & II; review accomplishments, goals and feedback. Begin outlining an agreed upon action plan towards making progress and meeting stated goals and objectives.

Step 3: Implement action plan, review progress, and revise as needed.

These guidelines and template are provided as an example that can be used in an Annual Planning Meeting or modified to suit individual needs.

Section I: Previous & Upcoming Goals

Accomplishments (*from previous year*)

Experimental Goals (*for upcoming year*)

Professional & Personal Goals (*for upcoming year*)

Barriers to Success (*identify current & potential obstacles*)

Feedback (*assessment of Postdoc or PI*)

Section II: Experimental & Professional Action Plan

January

February

March

April

May

June

July

August

September

October

November

December