

STUDENT NAME:

ADVISOR NAME:

ACADEMIC YEAR:

Setting goals and taking stock of whether you have accomplished those goals is a crucial habit to being productive, not just busy. Guided by the Individual Development Plan (IDP), formal meetings with your advisor are a chance for you to step back from your daily lab work, assess your progress, and plan for the future. Your advisor and mentors are invaluable resources to help you propose and execute next steps that will help make you a better scientist. This worksheet was designed to encourage constructive dialogue between PhD students and their mentors, identify goals for the upcoming year, and create a specific plan to help meet these goals. It is intended to cover not just scientific goals, but also career development with goals of enabling you to become more proactive in your career development.

HOW TO COMPLETE YOUR IDP

1**Step back and self-assess!**

It's easy to lose sight of the bigger picture. Fill out this form, using the questions as a starting point to consider your research progress, development, and goals.

2**Schedule your annual meeting with your advisor.**

In addition to annual progress meetings with your committee, you are responsible for scheduling and meeting with your advisor to go over your IDP. (Don't forget to share your completed IDP form with your advisor before the meeting.)

3**Lead the discussion.**

The IDP covers topics that other students have found helpful. If you have questions or additional objectives related to your training, these meetings are a great time to bring them up. This document is supposed to help organize the conversation. Think about the topics you want to prioritize in your meeting.

4**Complete the "Action Plan" and make a plan for following up.**

The last page of the IDP encourages you to establish concrete steps in the meeting with your advisor. Keep your Action Plan accessible and check on it every couple of months.

5**Submit required documentation by October 15th.**

Submit your completed IDP in your DukeBox that your DGSA created for you.

Scientific Research Goals and Objectives

- What is your dissertation intended to achieve? How familiar are you with the academic literature related to this topic?

- How comfortable are you with the literature and current discussions in your primary fields of research?

- How firm a grasp do you feel you have of the field or fields in which you work? If insufficient, what help do you need identifying relevant readings or other means to deepen your understanding of those domains of inquiry?

- What resources and methodological training do you need to conduct your upcoming research (e.g. funding, fieldwork, lab equipment, archives/databases)?
 - o Do you have access to these already? If not, how can your advisor help you?

- How do you feel your project is progressing? How confident are you in your ability to complete it by the end of your fifth year?

- What are your near-term research goals? For each goal, specify any areas where you feel you need help or additional training (e.g. the need to learn a specific skill). Include any techniques you want to learn, scientific, social scientific, or interdisciplinary collaborations, etc.

Challenges

- Describe any unusual or unanticipated challenges you experienced this year in trying to accomplish the goals you set out last year with your advisor.

- What actions have you taken to meet these challenges?

- How can your advisor help you? How has your advisor helped you in the past? Has that been working?

1. What program requirements do you still need to complete, and what is your plan to fulfill them?
2. What fellowships are you applying to, and have you been able to get the guidance you need? If not, how can your advisor help you?
3. What experience or experiences have been most valuable to you, your research, and/or your professional goals?
4. What are the training, teaching, or other opportunities that you believe are important for your professional development? What strategies do you use to identify such opportunities? What additional assistance would be helpful to you?
5. What are your commitments for the coming year in the following areas? Think about anticipated hours per week/month dedicated to each of these categories and which areas you would like to prioritize in the upcoming year:
 - Academic coursework/training
 - Teaching/mentoring
 - Professional development, including short courses or participation in side projects
 - Conferences
 - Service to department, school, or university
 - Outreach
6. Please explain what you hope to gain from some of these activities and experiences and how they will help you reach your goals?

One of the most important parts of your PhD training is to develop a skill set transferrable beyond graduation. Use this worksheet to assess and identify skills that you would like to target in the coming year, **marking your perceived current ability level from weak (1) to strong (3)** relative to where you think a student should be at the end of their PhD studies. Ask your advisor how s/he agrees or disagrees with this assessment. Spaces have been provided after each section to allow you and your advisor to add any additional target skills. An honest self-assessment and discussion will help you set goals for your training.

Research Skills & Scientific Social Thinking

	1 (weak)	3 (strong)	Target Skills for this Year
Broad-based knowledge of science			
Critical reading of scientific literature			
Experimental design, if relevant.			
Case study/ethnographic design.			
Statistical analysis			
Qualitative research methods			
Interpretation of data			
Creativity and innovative thinking			
Submission/peer review process.			
Other:			

Writing

- For scientific publication
- For a research proposal
- For a lay audience
- Grammar/structure
- Editing your own writing
- Other:

Oral Communications

- To a specialized audience
- To a lay audience
- In a classroom
- One-on-one
- English fluency

Leadership/Personnel Management

	1 (weak)	3 (strong)	Target Skills for this Year
Delegating/providing instruction			
Providing constructive feedback			
Dealing with conflict			
Leading and motivating others			
Serving as a role model			
Setting Expectations			
Other:			

Professionalism

- Identifying and seeking advice.
- Upholding commitments/deadlines
- Identifying and seeking advice
- Upholding commitments/deadlines
- Maintaining positive relationships.
- Approaching difficult conversations
- Other:

Project Management

- Planning projects
- Breaking down complex tasks
- Time management
- Managing data and resources
- Other:

Mentoring is a distributed process, ideally allowing you to take advantage of the talents and experiences of many people throughout your training. You may want to consider using all or some of the IDP as an impetus for conversations with each of your mentors, not just your advisor. In the space below, consider the breadth of mentoring you currently receive.

	How often are you meeting and otherwise providing updates?	Is this sufficient?	Do you initiate meetings and other modes of interacting?	Need help finding or coordinating?
Lead Mentor				XXXXXXXX
Thesis Committee (As a group)				
Thesis Committee (One-on-one)				
Collaborators (List names/roles in your research)				
Other				

Professional and Personal Development

- What are your long-term research goals (i.e., activities you want to be doing on a daily basis in 5-10 years after you graduate)?
- What opportunities and experiences might help you obtain these goals?
- For each goal you listed above, identify one or two short-term objectives that may be important to achieving that goal.
- What guidance would help you with your development and exploration of career options? How has your thinking about your long-term career goals changed in the past year and what factors affecting your thought process?
- What features of the lab group (or most important intellectual community) and your relationships with colleagues are most helpful and supportive to your personal development?
- Are there any factors that you are concerned may negatively affect your progress?
- What help can your advisor or other faculty/staff provide? Indicate if you need help finding professional or personal development resources.
- Your success as a student is tightly linked to your wellness. What are you doing to maintain work-life balance and positive mental health?

THIS ACTION PLAN IS TO BE DEVELOPED JOINTLY BY THE GRADUATE STUDENT AND THE MENTOR DURING OR AFTER THE DISCUSSION. Keep it accessible for your yearly IDP meetings and potential monthly check-ins, as determined by the two of you.

1

Project Timeline: What is the projected timeline for completing your current projects and publishing your work? What semester do you expect to graduate?

2

Target Skills: What (~1-2) did you identify as important development targets for the coming year? What actions are you planning to take to gain experience?

3

Activities: List any activities, whether sponsored within NSoE, hosted by other Duke units, or provided by entities outside Duke in which you and your mentor agree you should participate to achieve your academic objectives in the coming year.

4

Financial Support: If you know, what will be your financial support for the next year?

5

Additional Actions: In order to aid your success, are there any additional actions that can be initiated or continued by you? By your mentor?

6

Following Up: How often do you and your advisor plan to meet and otherwise interact, as through regular email updates (reports on progress, challenges, and action items)?

7

Deadlines: Please list any known upcoming deadlines/manuscripts/projects that will require your advisor's review or feedback.

8

Other: Is there anything else you would like to discuss with your advisor/mentors at this time?