

## OVERVIEW OF INDIVIDUALIZED DEVELOPMENT PLAN (IDP) at UC Santa Barbara

**What is an Individual Development Plan?** An Individual Development Plan (IDP) is a dynamic document completed by graduate students that communicates their academic goals to their advisors as well as identifies career goals and sets a path to help students be successful in graduate school and beyond. IDPs have long been used in the business world and because their effectiveness has been proven, they are increasingly used by universities to promote graduate student and postdoctoral training. **Through a self-assessment of skills, students are able to (1) identify their academic and career needs, and (2) maximize communication with advisors, set goals, and follow through.** There are 6 different categories that students are self-evaluating and then creating goals for:

- Scholarly Development
- Research Skills
- Communication Skills
- Teaching & Mentoring Skills
- Professional & Leadership Skills
- Career Development Skills

**Why the Individual Development Plan is implemented at UCSB:** According to the recent UC Graduate Student Well-Being Report (2017)<sup>1</sup>, which assessed responses from 13,000 graduate students from all 10 UC campuses, one third of students found that they were less than satisfied with the mentorship and advising they received in their programs. Importantly, the study found that satisfaction with mentorship and advising was associated with students who reported academic success and many respondents commented on the importance of the advisor relationship in helping them be successful. As a result, the study recommends that the UC universities “help empower students to maximize mentoring relationships by employing effective strategies in managing advisee/advisor relationships.”<sup>1</sup> **Therefore the IDP document stands as an important way to help ensure communication between advisors and advisees on identifying and meeting academic and career goals during graduate school and for success after.** Last, departments have annual reviews so this document is a tool to ensure graduate students are meeting departmental and program expectations.

**General Benefits of an Individual Development Plan:** Provides a structure to systematically identify training needs and competencies and to establish goals to accomplish them.

- Students stay on track with their research, paper and grant writing, and skill development.
- Students plan and prepare for their post-PhD future while in graduate school.
- A tool to facilitate communication between students and their advisor(s).

**Specific Benefits of an Individual Development Plan:** Findings from a 2005 multi-campus survey of US postdoctoral<sup>2</sup> underscore the importance of the IDP for career planning and professional development. Highlights of the survey include that postdocs with more professional development are:

- More satisfied
- Give their advisors higher ratings
- Report fewer conflicts with their advisors
- More productive
- Better at time management
- More efficient with resource use

<sup>1</sup> University of California Office of the President. (2017). The University of California Graduate Student Well-Being Survey Report. Retrieved from [http://www.ucop.edu/institutional-research-academic-planning/\\_files/graduate\\_well\\_being\\_survey\\_report.pdf](http://www.ucop.edu/institutional-research-academic-planning/_files/graduate_well_being_survey_report.pdf)

<sup>2</sup> Davis, G. (2006). Improving the PostDoctoral Experience: An Empirical Approach. *Sigma Xi:1 The Scientific Research Society*. [http://users.nber.org/~sewp/Davis\\_SurveyAnalysis20060201.pdf](http://users.nber.org/~sewp/Davis_SurveyAnalysis20060201.pdf)

Specifically, the survey found that compared to their peers without a written plan, postdocs who begin their appointment with an IDP developed in collaboration with their advisors:

- Are 23% more likely to submit papers to peer-reviewed journals
- Publish first-authored papers at a 30% higher rate
- Submit grant proposals at a 25% higher rate
- Are 25% less likely to report their advisor did not meet their initial expectations

**Goal of IDP :** By defining their academic and career goals early on in their training programs, graduate students will utilize the IDP as a tool to help increase productivity, incorporate professional development opportunities, and communicate effectively with advisors throughout their graduate programs. Through articulating a plan, the goal is that students will be able to identify gaps in technical skills/knowledge as well as identify professional development opportunities (e.g., teaching, exposure to non-academic careers, training in proposal writing, project management) targeted toward achieving their career of choice. With this tool, students will be better able to clarify their goals and expectations with their advisor which in turn leads to better communication, better planning, and more successful outcomes during and after graduate school. Students are also expected to consult their departmental expectations for degree requirements and general progress through their academic program. Please consult Graduate Program Advisor, Faculty Advisor, and/or department guide to clarify expectations.

**Timeline for How IDPs are Implemented:** IDP's at UCSB are a **student-led document**, where elements are shared with advisors as the student sees fit. The purpose for the student-led process is twofold: 1) to ensure privacy for the student in order to maximize student initiative, honesty, and usefulness of developing a plan<sup>3</sup>, and 2) to help instill a sense of ownership and self-determination during the student's graduate education where they are empowered to manage their own graduate careers<sup>3</sup>. However, **there is a minimum expectation for what the student does share with advisors** to ensure basic communication about academic goals are being discussed on an annual basis. Students are asked to share scholarly, research, communication, and teaching & mentoring goals. Students are welcome to share additional sections (i.e., Professional Development, Career) if they choose.

### **Suggested Implementation Plan:**

#### ***STUDENTS: Annual meeting with advisor during winter or spring quarter***

- Students fill out IDP and then meet with advisor/mentor to review goals, receive feedback from advisor(s), and ask advisor/mentor to sign Mentor Feedback page. Students are welcome to review IDP with other advisors/committee members as well.
- Students submit Mentorship Feedback page, and most current CV or professional resume to faculty, GPA, and/or [lanasmithhale@ucsb.edu](mailto:lanasmithhale@ucsb.edu)
- Students who have advanced to candidacy: Encouraged to review ImaginePhD (Humanities/Social Science), MyIDP (STEM), or Chem IDP (Chemistry) websites which are web-based career planning tools for non-academic careers. No need to turn anything in to advisors.

#### ***ADVISOR/MENTOR: Annual meeting during winter or spring quarter***

- Meet with graduate student to review IDP goals, complete Mentor Feedback page and sign.

**Questions?** Email Lana Smith-Hale, Graduate Career Counselor [LanaSmithHale@ucsb.edu](mailto:LanaSmithHale@ucsb.edu)

<sup>3</sup> Folkman, J. (2016). *The No. 1 Reason Most Personal Development Plans Fail*. Forbes. Retrieved from <https://www.forbes.com/sites/joefolkman/2016/03/31/the-1-reason-most-personal-development-plans-fail/>.



## Student Section

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# MY INDIVIDUAL DEVELOPMENT PLAN

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UNIVERSITY OF CALIFORNIA, SANTA BARBARA

Name: \_\_\_\_\_

Department: \_\_\_\_\_

Degree Objective: \_\_\_\_\_

Year in Graduate School: \_\_\_\_\_

Advisor(s): \_\_\_\_\_

**UC SANTA BARBARA**  
**Career Services**

# THE IDP PROCESS



Steps	For Student	For Advisor
1	Self-assessment of your skills and interests	
2	Write your IDP goals	
3	Discuss goals with advisor	Review goals & provide feedback
4	Implement your plan	
5	Update IDP as you progress	Review regularly & provide support

## Graduate Student Instructions & Timeline

- ❑ Complete pages 3-11 of IDP, including skills assessment and goal creation. Share goals & self-assessment for the following categories: Scholarly Development, Research Skills, Communication Skills, and Teaching & Mentoring Skills. Sharing details of Professional & Leadership Skills and Career Development Skills are OPTIONAL.
- ❑ Meet with advisor/mentor to review goals, get feedback and support on creating goals. Coordinate with advisor/mentor if they would like to see your goals before you meet. Advisor/mentor signs Mentor Feedback page.
- ❑ Students submit mentor feedback page, cover page, most current CV or professional resume to [LanaSmithHale@ucsb.edu](mailto:LanaSmithHale@ucsb.edu). Please email Lana with any questions. Suggested deadline is end of Spring Quarter.
- ❑ To supplement this IDP consider visiting Imagine PhD, MyIDP, or ChemIDP to review non-academic jobs associated with your skills, values, and interests:



STEM

[www.myidp.sciencecareers.org](http://www.myidp.sciencecareers.org)


Social Science + Humanities

[www.imaginephd.com](http://www.imaginephd.com)


Chemistry

<http://chemidp.acs.org>


## STEP 1: SKILLS SELF ASSESSMENT

Self-assessments are a good tool to help you reflect and analyze what your **current skill set is** and the **skills you want to further develop**. The skills assessment is split into 6 categories for you to address. If you are unsure of your skills, consider talking with your advisor, mentors, peers, and others who work with you to see how they perceive your skills. If you are interested in further self-assessment, consider exploring your values and interests. There are career assessments available through UCSB Career Services including StrengthsFinder and values assessments, or check out [www.lifevaluesinventory.org](http://www.lifevaluesinventory.org). Rate the following skills based on how confident you are in them, from 5 being confident and highly proficient to 1 being unconfident and needs improvement. Skills that are not relevant or not applicable to you, mark N/A. Skills are ordered alphabetically. Communicate with advisor to prioritize goals.

### Scholarly Development

	N/A	1	2	3	4	5
Technical skills related to my research/creative area						
Specific technical skill 1 _____						
Specific technical skill 2 _____						
Specific technical skill 3 _____						
Detailed knowledge of my research/creative area						
Specific knowledge 1 _____						
Specific knowledge 2 _____						
Specific knowledge 3 _____						

### Research Skills

	N/A	1	2	3	4	5
Experimental design						
Interpreting data						
Navigating peer review process						
Statistical analysis						
Other: _____						

**Communication Skills**

	N/A	1	2	3	4	5
<i>Ability to give constructive feedback</i>						
<i>Ability to receive constructive feedback</i>						
<i>Communication and etiquette on various platforms (e.g. e-mail, social media, etc.)</i>						
<i>Connecting with mentors, colleagues and/or mentees</i>						
<i>Literature search and literature reviews</i>						
<i>Negotiating difficult conversations</i>						
<i>Oral presentation for discipline specific audience</i>						
<i>Oral presentation for general audience</i>						
<i>Seeking advice from advisors and mentors</i>						
<i>Writing for discipline specific audience</i>						
<i>Writing for a general audience</i>						
<i>Other: _____</i>						

**Teaching and Mentoring Skills**

	N/A	1	2	3	4	5
<i>Leading discussion sections or labs</i>						
<i>Leading lectures</i>						
<i>Dealing with conflict</i>						
<i>Providing constructive feedback</i>						
<i>Providing instruction and guidance</i>						
<i>Training and mentoring individuals</i>						
<i>Serving as a role model</i>						
<i>Other: _____</i>						

**Professionalism and Leadership Skills**

	N/A	1	2	3	4	5
<i>Complying with rules and regulations</i>						
<i>Contributing to discipline (e.g. member of professional society)</i>						
<i>Contributing to institution (e.g. serve on committees)</i>						
<i>Developing/managing budgets</i>						
<i>Delegating responsibilities</i>						
<i>Leading and motivating others</i>						
<i>Maintaining positive relationships with colleagues</i>						
<i>Managing projects and time</i>						
<i>Upholding commitments and meeting deadlines</i>						
<i>Workplace etiquette</i>						
Other: _____						

**Career Development Skills**

	N/A	1	2	3	4	5
<i>Attend career development workshops, conferences, or networking events</i>						
<i>Awareness of career opportunities in your field</i>						
<i>Awareness of career-oriented graduate certificates or trainings</i>						
<i>CV and resume building</i>						
<i>Identify and increase transferable skills in career field of interest (e.g., internship, job shadow, informational interviews)</i>						
<i>Increase professional network (academic or non-academic connections)</i>						
Other: _____						

## Self-Assessment Summary

Take a look at your skills assessment and create a summary below. Evaluate which skills you are confident in and also skills that you are unconfident in. For both, consider mainly the skills which are relevant and valuable to your academic, career, and personal goals.

*Hint: look at your 4's and 5's for your stronger skills, and your 1's and 2's for skills you want to work on.<sup>1</sup>*

Confident	Unconfident

## Reflect on Your Self-Assessment

As part of the assessment step and in order to create a useful and individualized IDP, consider exploring your current goals and future goals. By exploring your needs in this way, you will be able to develop skills that will be both beneficial to your current position as a graduate student as well as your career after you graduate.<sup>2</sup>

### Current Position

- What requirements and responsibilities do you need to meet for the next year?
- What discipline-specific knowledge and technical skills do you need to develop?
- What scholarly activities do you want to engage in?
- **Examples:** co-author paper, join a professional organization, present at a conference

### Future Position

- What type of work do you want to do? How will your current role help you get there?
- What skills, competencies, or experience do you need to make yourself qualified?
- What other career-exploration and job skills do you need to engage in?
- **Examples:** learn networking skills, conduct informational interviews, learn about different professions, get involved with a local organization

<sup>1</sup> Table adapted from University of Wisconsin Individual Development Plan. Retrieved from [https://grad.wisc.edu/wp-content/uploads/2016/05/New\\_UW\\_IDPform-FINAL-fillable.pdf](https://grad.wisc.edu/wp-content/uploads/2016/05/New_UW_IDPform-FINAL-fillable.pdf)

<sup>2</sup> Adapted from Florida State University Individual Development Plan. Retrieved from [https://gradschool.fsu.edu/sites/g/files/upcbnu761/files/media/Files/FSU%20Individual%20Development%20Plan\\_final.pdf](https://gradschool.fsu.edu/sites/g/files/upcbnu761/files/media/Files/FSU%20Individual%20Development%20Plan_final.pdf).



## STEP 2: CREATE YOUR IDP

Utilize SMART goals to help you identify next steps forward: **S= specific, M= measurable, A= action, R= results, T=time-specific**. Develop specific and discernible goals that describe what you want to learn. Make sure they are measurable so that you can clearly track if you've accomplished the goal. Describe what action you want to take in order to learn the skills/goal and next, identify the results and outcomes that you expect to gain. In order for a goal to be realistic, make sure that you have a timeframe so that you can complete the actions you need to take.

**You are also expected to review your department goals and expectations.** Please review your departmental handbook, review with your advisor, and/or talk with your Graduate Program Assistant (GPA) or Graduate Faculty Advisor to understand how your program goals align with the department's standards and time-to-degree requirements. If you have questions about how your goals fit into your departments expectations, bring it up with your advisor to collaborate on creating goals that achieve your needs as well as the departments.

*It is encouraged that these goals are clarified and updated with feedback from your advisor. Coordinate with your advisor if they would like to receive these goals prior to your annual review meeting.*

### Goals

#### Scholarly Development Goals

Goal	Approach or strategy	Timeframe	Outcome	✓
Example: Build knowledge of specific topic	Read 10 journal articles on topic, discuss with advisor and find class to take on topic	Beginning of winter quarter 2017	A typed summary document with citations for future reference	

**Research Goals**

Goal	Approach or strategy	Timeframe	Outcome	✓
Example: Use online bibliography for citations management	Receive training on use of Refworks and other online database software from library staff	End of fall quarter 2017	Have an organized electronic database of citations	

**Communication Goals**

Goal	Approach or strategy	Timeframe	Outcome	✓
Example: Initiate mentoring relationships	Interact with academic program faculty and graduate students further along in the program.	Academic year, 2014-2015	Established mentoring relationships.	

**Teaching and Mentoring Goals**

Goal	Approach or strategy	Timeframe	Outcome	✓
Example: Strengthen skills as a role model	Find and hire an undergraduate student to mentor in the lab through BIONews listserv.	Academic year 2017-2018	Establish a mentoring and teaching relationship with an undergraduate student	

**Time-to-Degree Standards and Department Requirement Considerations**

Standard or Requirement	Approach or strategy	Timeframe	Outcome	✓
Example: Dissertation Proposal	Breakdown proposal into 3 steps to manage: fall quarter write a draft of the proposal; end of winter quarter submit to advisor to review, spring quarter revise and resubmit.	Due end of Third Year (June 2019)	In process	

***Professionalism and Leadership Goals***

Goal	Approach or strategy	Timeframe	Outcome	✓
Example: Gain experience with managing budgets	Apply to be treasurer of GSA, receive training from outgoing officer.	Spring 2018	Be able to manage an organized and efficient budget, gain leadership skills	

***Career Development Goals***

Goal	Approach or strategy	Timeframe	Outcome	✓
Example: Create CV	Attend a CV workshop and meet with a career counselor to critique CV, then make revisions as needed	End of winter quarter 2016	A professional CV	

## Goals Summary

Take a look at the goals you created, and evaluate where they fall within your priorities for the upcoming year. **Keep in mind and include employment and academic obligations (e.g., TAs, ships, coursework, lab obligations)** as you construct your goals. There is also space for you to identify upcoming goals for your program that are not applicable this year. This will help you to know where to start, and to stay on track!<sup>3</sup>

ACADEMIC YEAR: \_\_\_\_\_

	Fall Quarter	Winter Quarter	Spring Quarter	Summer
High priority				
Low priority				
Long Term Goals				

<sup>3</sup> Table adapted from University of Wisconsin Individual Development Plan. Retrieved from [https://grad.wisc.edu/wp-content/uploads/2016/05/New\\_UW\\_IDPform-FINAL-fillable.pdf](https://grad.wisc.edu/wp-content/uploads/2016/05/New_UW_IDPform-FINAL-fillable.pdf)

## STEP 3: DISCUSS WITH ADVISOR

According to the UC Graduate Student Well-Being Survey which looked at 13,000 graduate students across all 10 UC campuses, graduate students who felt satisfied with mentorship and advising were more likely to report being on track to complete their degree programs on time. Being able to receive meaningful feedback from your advisor is one part of helping increase satisfaction with the mentor-mentee relationship and Step 3 of the IDP is meant to help facilitate this goal.

**The expectation from students with Step 3** is that the student shares at a minimum the following:

- ☐ First four goals (i.e., Scholarly Development, Research Skills, Communication Skills, and Teaching and Mentoring Skills) (pages 7-9)
- ☐ Department expectation goals with your advisor(s) (page 9)
- ☐ Goals Summary (page 11)
- ☐ Complete Mentor Feedback page (page 14)

### Other considerations:

- ☐ Students are welcome to share additional sections as they choose and are welcome to share their goals with additional committee members.
- ☐ According to Kerns and Gardiner (2011)<sup>4</sup> who write about the care and maintenance of a supportive advisor relationship, they suggest that *students be specific about what types of feedback they are looking for and what they'd like their advisor to note.*
- ☐ The expectation from advisors with Step 3 is that they reflect thoughtfully on the student's goals and advise on approach or strategy where needed. Advisors are expected to provide support and suggestions for how the student can achieve their academic and career goals.
- ☐ Coordinate directly with your advisor if they would like to receive the documents prior to your annual review meeting or if you will be going over the goals together at the meeting for the first time.

**Most of all, this annual review is an opportunity for both parties to be explicit about timelines and clarify expectations about future work and responsibilities.**

<sup>4</sup> Kerns, H. & Gardiner, M.L. (2011). The care and maintenance of your adviser. *Nature*, 469 (7331), 570-570.

## STEP 4: IMPLEMENT PLAN & RESOURCES

Put your plan into action and seek support you may need to remain on track. Remember that you should be flexible and modify your IDP if your goals or circumstances change. Refer to your IDP often and add your IDP deadlines to your calendar to integrate them with deadlines for other work and personal events.

### Career and Professional Development Resources for Grad Students

- ☐ Meet with the Graduate Career Counselor, Lana Smith-Hale, for on-to-one help navigating career exploration and for feedback on professional documents. She is available by appointment at 805-893-4412 in the Student Resource Building (rm 1216)
- ☐ The Graduate Student Resource Center, located in the Student Resource Building, offers graduate student centered resources. You can meet with graduate peers for funding, writing, diversity, international students, professional development, and career support. For example, you could meet with the Graduate Career Peer for feedback on your resume, cover letter, CV or LinkedIn.
- ☐ Check out the **Graduate Student Career Guide** for comprehensive information on academic and non-academic job search process, sample materials, and job search resource.
- ☐ Check out the GradPost ([www.gradpost.ucsb.edu](http://www.gradpost.ucsb.edu)) and subscribe for information on graduate student resources, employer info sessions, career and professional development workshops and events.
- ☐ Consider attending Beyond Academia Conference or Academic Job Market workshop.

### Writing and Academic Support for Graduate Students

- ☐ Meet with the Graduate Writing Specialist, Robby Nadler, who offers writing consulting services for graduate students as well as topical workshops. Email at [robby.nadler@graddiv.ucsb.edu](mailto:robby.nadler@graddiv.ucsb.edu).
- ☐ Meet with the Graduate Division Academic Counselor, Ryan Sims for help with academic support planning. Email at [ryan.sims@graddiv.ucsb.edu](mailto:ryan.sims@graddiv.ucsb.edu).

## STEP 5: REVIEW AND REVISE

Now that you have completed your individual development plan, it is important that you continue to check back in with it to see your progress and evaluate whether you need to alter or change your goals. If you have completed all your goals, this is a great time to set yourself with new ones! Tips for success:

- ☐ Print out your plan and keep it somewhere visible
- ☐ Celebrate progress and check off your completed goals!
- ☐ Schedule regular meetings with your advisor and discuss your progress
- ☐ Update and review your plan regularly, and every 6 months at minimum
- ☐ Don't be afraid to ask for help and seek out advice from mentors and campus resources

UCSB's IDP Developed by: Lana Smith-Hale, LCSW & Caroline Schanche, M.A.



### ***Mentor Feedback***

<i>Scholarly Development</i>	
<i>Research</i>	
<i>Communication</i>	
<i>Teaching and Mentoring</i>	
<i>Professionalism and Leadership (optional)</i>	
<i>Career Development (optional)</i>	
<i>Program Requirement Considerations</i>	
<i>Additional Feedback</i>	

Student Signature: \_\_\_\_\_ Date Discussed: \_\_\_\_\_

Advisor Signature: \_\_\_\_\_ Approx. Date of Next Review: \_\_\_\_\_



## Individualized Development Plan (IDP) for Grad Students Advisor Information

Steps	For Student	For Advisor/Faculty
1	Self-assessment of your skills and interests	
2	Write your IDP	
3	Discuss goals with advisor	Review goals & provide feedback
4	Implement your plan	
5	Update IDP as you progress	Review regularly & provide support

### Advisor/Faculty = IDP Mentor

#### FACULTY/ADVISOR: Annual meeting during winter or spring quarter

- Meet with graduate student to review IDP, complete Mentor Feedback page and sign
- Student will turn in form to Lana Smith-Hale, Graduate Career Counselor end of Spring quarter (suggested timeframe)

#### What is an Individual Development Plan?

An Individual Development Plan (IDP) is a dynamic document completed by graduate students that communicates their academic goals to their advisors as well as identifies career goals and sets a path to help students be successful in graduate school and beyond. IDPs have long been used in the business world and because their effectiveness has been proven, they are increasingly used by universities to promote graduate student and postdoctoral training. Through a self-assessment of skills, students are able to **(1) identify their academic and career needs, and (2) maximize communication with advisor(s), set goals, and follow through.** Please refer to Overview of IDPs document for more details.

#### General Benefits of an Individual Development Plan

- Provides a structure to systematically identify training needs and competencies and to establish goals to accomplish them.
- Students stay on track with their research, paper and grant writing, and skill development.
- Students plan and prepare for their post-PhD future while in graduate school.
- A tool to facilitate clear communication between students and their advisor(s).

UCSB's IDP Developed by: Lana Smith-Hale, LCSW & Caroline Schanche, M.A

### *Mentor Feedback*



### ***Mentor Feedback***

<i>Scholarly Development</i>	
<i>Research</i>	
<i>Communication</i>	
<i>Teaching and Mentoring</i>	
<i>Professionalism and Leadership (optional)</i>	
<i>Career Development (optional)</i>	
<i>Program Requirement Considerations</i>	
<i>Additional Feedback</i>	

Student Signature: \_\_\_\_\_ Date Discussed: \_\_\_\_\_

Advisor Signature: \_\_\_\_\_ Approx. Date of Next Review: \_\_\_\_\_