

Berkeley Individual Development Plan (IDP) Recommended Practices

In response to the recent policy revision of the National Institutes of Health¹ requiring that grant recipients report on institutional practices on the use of IDPs, a UC Berkeley *IDP Working Group* was formed in 2014-15 with representatives from Graduate Division, Graduate Assembly, Visiting Scholar and Postdoc Affairs, Career Center, Berkeley Postdoctoral Association, Humanities and Social Sciences Association, faculty, graduate program administration, and the Berkeley Research Development Office/Vice Chancellor for Research Office.

The task of this working group was to provide information, guidance, and recommendations to the campus community in order to facilitate and streamline the process of implementing IDPs in graduate and postdoc training. These are given below.

What you need to know

For Trainees (Graduate students and postdocs):

- **Objective and expectation:** The use of an Individual Development Plan (IDP) can help you evaluate your skills, assess career options and identify steps to reach your career goals throughout your training. The IDP working group *encourages* you to use an IDP; your department, program or faculty mentor may *require* it.
- **Confidentiality:** The content of the IDP is confidential and for personal use; while you may be asked to provide proof of completion, you should not have to share the IDP itself. Discussions with your mentors are encouraged.
- **Tools:**
 - Life Sciences/STEM: Use the free, online, interactive [myIDP from ScienceCareers/AAAS](#).
 - Humanities and Social Sciences: tools coming soon. (For temporary resources, please see text below)

For PIs:

- The working group recommends that you encourage the use of IDPs for your trainees and support them through the process.

¹ [NOT-OD-14-113](#)

- Faculty with NIH funding should report on UC Berkeley's IDP policy and IDP use in your lab in your NIH grant reports. Until further updates are made, you can use the following text:

“Berkeley graduate students and postdocs are encouraged to utilize IDPs every year to set academic and career goals and facilitate conversations with their mentor(s). Similarly, Berkeley faculty mentors are encouraged to promote the use of IDPs among their trainees. The recommended tool for life sciences is [myIDP from ScienceCareers/AAAS](#). The Berkeley IDP working group provides information and can help create training sessions to facilitate the use of IDPs.”

If you want to know more

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What is an Individual Development Plan (IDP) and how should it be used?

At UC Berkeley we define the IDP as a private, dynamic, annual self-evaluation and career exploration tool for graduate students and postdocs. It is a *written* list of goals mapped to a timeline and includes goal setting for research projects, skills development, and career planning.

The IDP is to be written and developed by the trainee, and can serve as a framework for discussion between faculty mentor and trainee. The IDP is most meaningful if trainees (with support from their mentors) make full use of the IDP's potential as a research agenda and career development tool, and update it annually to reflect accomplishments and changes in career and research objectives.

What are the advantages of completing an IDP?

Trainees who complete a written plan report improved productivity and more effective interactions with their mentors with respect to career *and* research goals. Many trainees are aware of the challenges of the faculty job market and funding trends within academic science. They are somewhat aware of their other career options, but express a need for improved guidance in these options. An IDP is a useful tool to help graduate students and postdocs (1) set goals for their career, including goals impacting their research and training outcomes, and (2) identify steps towards achieving those goals (for example, when to apply for fellowships). In addition, the IDP process also increases the trainee's awareness of skills and their ownership of the steps towards their future career, which may improve the general feeling of well-being.

In addition to the obvious benefits to our trainees and compliance in grant reporting for NIH (see below), use of IDPs has the potential to increase Berkeley's competitiveness for funding, and increase student and postdoc recruitment and retention.

How is the IDP different from the trainee's annual assessment?

The IDP is not a formal assessment tool, but it can aid the trainee in preparing for existing annual evaluation requirements. While trainees may choose to work on an IDP and an annual evaluation at the same time of year, the two documents are fundamentally different:

1. The annual evaluation is written by the mentor, while the IDP is written by the trainee (potentially with input from the mentor).
2. The annual evaluation is an official assessment tool for the university to track the trainee's accomplishments. In contrast, the IDP is a personal and private career exploration and goal setting tool to help the trainees plan out their training.
3. Annual evaluations generally focus only on trainees' academic accomplishments: advancing to candidacy (for graduate students), publishing papers, analyzing data, etc. The IDP, however, may have a mix of both academic and non-academic goals. For example, a graduate student who wants to become a science policy consultant for the government would have an annual evaluation that still focused on his/her academic achievements, but his/her IDP might include finding a mentor who currently works for the government, practicing conveying scientific ideas to legislators, etc.

IDP Tools

For Life Sciences and STEM: We recommend using the free, online, interactive [myIDP from ScienceCareers/AAAS](#). This IDP tool was developed by a team of scientists and career advisors (including staff from UCSF) for trainees in biomedical/STEM sciences. In addition to setting goals for research projects, it encourages exploration of a full range of

career options, and involves a four-phase process: Self-assessment (skills, interests and values), Career Exploration, Goal Setting, and Implementation. Since *myIDP* is quite detailed in its questions, trainees may find that the assessment and career exploration becomes increasingly more helpful as they progress throughout their training (e.g., pass qualifying exams, enter postdoc position). However the sections entitled "Set Goals" and "Implement Plan" are relevant at every stage of training and professional development. Learn more about the IDP process and using *myIDP* [here](#).

For Humanities and Social Sciences: Nationally, the [Graduate Career Consortium](#) is working on an adaptation of the AAAS *myIDP* tailored towards for humanities and social sciences. In the meantime, the Berkeley IDP working group is also working on their own Individual Development Plan for Humanists and Social Scientists (IDP-HUMSIS). Please contact Andrew Green from the Career Center at aegre@berkeley.edu for more information.

Alternatives: Should departments, programs, faculty mentors or trainees prefer to create their own IDP tools or forms tailored to their specific needs, it is recommended to include sections on career objectives, skills assessment and goal setting for the next year. Some resources that can help you create your own IDP include:

- [Mentees: Example IDP Templates](#) (University of Wisconsin-Madison)
- [Individual Development Plan for Postdoctoral Fellows](#) (Federation of American Societies for Experimental Biology (FASEB))
- [Postdoc Research and Career Progress: Annual Review - Sample](#) (FASEB)

Why are we implementing IDPs more formally now?

Since July 2013, NIH encourages institutions "to assist graduate students and postdoctoral researchers to achieve their career goals within the biomedical research workforce through the use of Individual Development Plans (IDPs)". In August of 2014, NIH released a [notice](#) to state that institutions/faculty are required to report on progress toward this goal in all progress reports submitted on or after *October 1, 2014*. (See section below on what PIs should do for further guidance on the reporting.)

In the future, other agencies (e.g., American Cancer Society, Susan G. Komen for the Cure, etc.) may also adopt this requirement as they have with past NIH requirements. Thus, it is a good idea to have an IDP in place for trainees who receive any extramural funding.

Furthermore, the use of an IDP is beneficial for all graduate students and postdocs, regardless of funding source or discipline and we encourage IDP use across campus.

What should UC Berkeley PIs do in this process?

Support: The primary responsibility for completing the IDP rests with the trainees (graduate students and postdocs). Faculty mentors are encouraged to implement IDP use among their trainees and provide support in the process. Support may include confidential one-on-one meetings if a trainee wants to discuss certain parts of their IDP with their mentors (e.g. skills development and action steps). In general, constructive feedback in an open environment and receptiveness to long-term career goals outside of academia lead to the most effective use of the IDP.

Report (for those with NIH funding):

From the UC Berkeley SPO website (<http://www.spo.berkeley.edu/guide/nih.html>):

All NIH progress reports (RPPRs) submitted after October 1, 2014 must include a report on the use of IDPs in Question B.4. This should be a brief description of how and whether individual development plans (IDPs) are used to identify and promote the career goals of graduate students and postdoctoral researchers associated with the award. Actual IDPs should not be included.

The following statement is provided to assist Berkeley PIs respond to Section B of the RPPR:

“Berkeley graduate students and postdocs are encouraged to utilize IDPs every year to set academic and career goals and facilitate conversations with their mentor(s). Similarly, Berkeley faculty mentors are encouraged to promote the use of IDPs among their trainees. The recommended tool for life sciences is [myIDP from ScienceCareers/AAAS](#). The Berkeley IDP working group provides information and can help create training sessions to facilitate the use of IDPs.”

Please note that reports will be stronger if they include more specific details on how IDPs are used in that particular research group.

Certifying the completion of IDPs, using the myIDP website

In response to the NIH's call for institutions to report on IDP use for all their trainees, [myIDP](#) developed a feature that allows users to print out or email a certificate documenting their progress in creating an IDP. The certificate will have a checklist that reports which sections of *myIDP* have been completed and whether there has been a discussion with the mentor (without showing any of the content). This certificate function could help faculty or administrative officials track IDP use.

More information

- Berkeley's *IDP working group* will continue to develop resources related to IDP implementation, including training sessions and expansion to different programs, departments and disciplines across campus. Updates will be posted as they become available.

- In her July 23, 2013 [blog](#), Sally Rockey, NIH Deputy Director for Extramural Research at that time, provided guidance about NIH's intentions with regard to IDP's.
- In his September 7, 2012 [Editor's Letter in Science](#), Bruce Alberts made note of the importance of career planning for members of tomorrow's biomedical workforce.
- For more information about what an IDP is, see this [article](#) from *ScienceCareers*.

Questions?

Please contact Kim Baeten (kim.baeten@berkeley.edu) from the working group with any questions, suggestions or concerns about IDPs.

This content was adapted from:

- UCSF - Office of Career & Professional Development (with permission from Bill Lindstaedt): <https://career.ucsf.edu/grad-students-postdocs/myIDP>
- UC San Diego - Office of Postdoctoral & Visiting Scholars Affairs (with permission from Ginger Hazen and Zoe Ziliak Michel): <http://postdoc.ucsd.edu/idp/>