Joseph Lutz, PhD

Director of PRISM

joseph.lutz@uky.edu

**Postdoc Annual Evaluation & Individual Development Plans**

The training environment and experience sponsoring professors provide to postdocs is paramount to the support of their career and professional development. Postdocs contribute substantially to research and creative work at the University of Kentucky through their commitment, hard work, and expertise. PRISM provides this document as a template to initiate an ongoing discussion in mentoring postdoctoral scholars and fellows. This template is intended to help facilitate communication and feedback between sponsoring professors and postdocs to align mutual expectations and increase research and creative work productivity. Further, this template can be used to fulfill trainee career and professional development sections required for progress reports on funded research.

myIDP (<http://myidp.sciencecareers.org>) and Imagine PhD (<https://www.imaginephd.com/>) provide online alternatives that are also appropriate to use to frame these, sometimes, difficult conversations.

The document is divided into 3 parts:

**Part 1: Postdoc Annual Evaluation and Assessment**

To be filled out by the sponsoring professor, the more detailed provided the better

**Part 2: Summary of Activities, Self-Assessment and IDP**

To be filled out by the postdoc and turned in to sponsoring professor

**Part 3**: **Discussion and Goal Setting**

Sponsoring professor and postdoc should meet in person to discuss Parts 1 & 2 and set goals/development plan and refine IDP



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**PART 1: POSTDOC ANNUAL EVALUATION & ASSESSMENT**

(To be filled out by the sponsoring professor)

|  |  |
| --- | --- |
| Postdoc Name:  |  |
| Department: |  |
| Position (select one):  | □ Postdoc Scholar □ Postdoc Fellow |
| Funding Source: |  |
| Postdoc Start Date: |  |
| Postdoc End Date: |  |
| Sponsoring Professor:  |  |
| Date of evaluation: |  |
| Next evaluation date:  |  |

**Research Skills**: Please evaluate the following skills and use the comment section to provide details.

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
|  | Excellent | Good | Satisfactory | Fair | Poor | N/A or Unable to assess |
| Progress on current project(s) |  |  |  |  |  |  |
| Takes ownership of project/shows initiative |  |  |  |  |  |  |
| Familiarity with discipline  |  |  |  |  |  |  |
| Develops innovative ideas  |  |  |  |  |  |  |
| Logically designs & executes experiments |  |  |  |  |  |  |
| Interprets data accurately  |  |  |  |  |  |  |
| Learns & applies new techniques  |  |  |  |  |  |  |

Examples or Comments:

|  |
| --- |
|  |

**Communication Skills**: Please evaluate the following skills and use the comment section to provide details.

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
|  | Excellent | Good | Satisfactory | Fair | Poor | N/A or Unable to assess |
| Written communication skills  |  |  |  |  |  |  |
| Oral communication skills  |  |  |  |  |  |  |
| Effectively presents work and responds to questions appropriately  |  |  |  |  |  |  |

Examples or Comments:

|  |
| --- |
|  |

**Interpersonal Skills**: Please evaluate the following skills and use the comment section to provide details.

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
|  | Excellent | Good | Satisfactory | Fair | Poor | N/A or Unable to assess |
| Cooperation with others  |  |  |  |  |  |  |
| Responds positively to work demands  |  |  |  |  |  |  |
| Reliability/Attendance/Punctuality  |  |  |  |  |  |  |

Examples or Comments:

|  |
| --- |
|  |

**Other skills**: Please evaluate the following skills and use the comment section to provide details.

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
|  | Excellent | Good | Satisfactory | Fair | Poor | N/A or Unable to assess |
| Reads and evaluates literature  |  |  |  |  |  |  |
| Generates alternative solutions to problems  |  |  |  |  |  |  |
| Assists in writing grants/proposals or has written own grants, proposals  |  |  |  |  |  |  |
| Participates in departmental, national meetings  |  |  |  |  |  |  |
| Involved in teaching, mentoring  |  |  |  |  |  |  |
| Leadership skills  |  |  |  |  |  |  |

Examples or Comments:

|  |
| --- |
|  |

**Overall Assessment**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
|  | Excellent | Good | Satisfactory | Fair | Poor |
| Overall Current Performance  |  |  |  |  |  |

Examples or Comments:

|  |
| --- |
|  |

**PART 2: POSTDOC SUMMARY OF ACTIVITIES, SELF ASSESSMENT & IDP**

(To be filled out by postdoc and turned in to the sponsoring professor prior to meeting)

**Since the last meeting/review/evaluation:**

Write an overview of your Research Project and Major Accomplishments (1/2 page max):

|  |
| --- |
|  |

List Scholarships, grants, honors or awards (applied for, received or pending; indicate start & end dates):

|  |
| --- |
|  |

List all Publications (including Journal Articles & Abstracts), Presentations, Collaborations, Grant Writing and Teaching Exercises (include submitted and those in print)

|  |
| --- |
|  |

List National or other professional meetings attended:

|  |
| --- |
|  |

List Teaching Activities (if applicable):

|  |
| --- |
|  |

List Research Goals for the next year:

|  |
| --- |
|  |

Describe your level of satisfaction with your research progress:

|  |
| --- |
|  |

Assessment of Your Strengths and Weaknesses:

|  |
| --- |
|  |

List Career Development Goals for the next year:

|  |
| --- |
|  |

Current career choice(s):

|  |
| --- |
|  |

When do you anticipate beginning a job search?

|  |
| --- |
|  |

Are there any issues that affect your job search? (i.e. geographical, spouse, etc.)

|  |
| --- |
|  |

**Individual Development Plan (IDP)**

Creating an IDP is a great way for postdocs and sponsoring professors to develop a successful plan for the postdoc. PRISM recommends myIDP (<http://myidp.sciencecareers.org>) for postdocs in the sciences and Imagine PhD (<https://www.imaginephd.com/>) for postdocs in the humanities. Postdocs should create an IDP to review and discuss with their sponsoring professors at the annual meeting.

Postdocs and sponsoring professors are also encouraged to review the Associate of American Medical Colleges (AAMC) Compact between Postdoctoral Appointees and Their Mentors:

<https://www.aamc.org/what-we-do/mission-areas/medical-research/post-doc-compact>

Please update your CV and attach.

Postdoc Signature:

 Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Principal Investigator Signature:

 Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**PART 3: ANNUAL EVALUATION DISCUSSION AND GOAL SETTING**

During the annual meeting, it is recommended that postdocs and sponsoring professors discuss the annual review (part 1) and postdoc self-assessment & IDP (part 2). Together, the postdoc and sponsoring professor should set goals for the upcoming year and review and update the IDP. Other suggested topics of discussion are:

* Research Directions – future experiments & projects, publication timeline, authorship
* Funding Status - status of funding over the next 1-2 years, fellowship application(s)
* Professional & Career Development – what skills does the postdoc need to be successful, creation of a mentoring team
* Future Career Goals – strengths and weakness related to targeted future position(s)

Goals:

|  |
| --- |
|  |

Postdoc Signature:

 Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Principal Investigator Signature:

 Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_