**APPENDIX A**

**Individual Development Plan for Postdoctoral Scholars**

**A resource for postdocs and faculty at Penn State developed by the Office of Postdoctoral Affairs.**

INFORMATION

Name of Postdoctoral Scholar:

Department:

Starting Date of Postdoc : \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Signature: Date:

PI:

PI signature: Date:

If more than one PI, include their name and signature also. Indicate which PI is evaluating performance and responsible for the hiring and renewal.

RESEARCH PROJECT INFORMATION

1. List and describe the scientific aims or goals of research project(s). Identify if you are beginning a new project or a new inquiry or building on previous work in the group

Postdoc:

Faculty PI comments:

1. List publication(s) associated with each project ( for 2nd year of IDP review)

Postdoc:

Faculty PI comments:

1. List new methods developed or learned since last IDP or in this year OR

List the new methods that you plan to learn or use in your current research.

Postdoc:

Faculty PI comments:

1. Did you present your research at any conferences or meetings or do you plan to present at any upcoming meetings or conferences?

Postdoc:

Faculty PI comments

1. Will there be any scope of any grant or fellowship application? OR List any (potential) grant applications?

Postdoc:

Faculty PI comments:

1. Teaching related opportunities if relevant (i.e. interested in teaching faculty or tenure track faculty position). Include Co-teaching, leading a Seminar series, Attending undergrad pedagogy seminars.

Postdoc:

Faculty PI comments:

1. Mentoring undergrads or graduate students

Postdoc:

Faculty PI comments:

1. List goals in each of the categories of skills development or top 5 goals and their timeline.

Professional development opportunities

What are your short-term career goals? Describe your timeline for achieving them?

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Short term goal | Anticipated timeline | Comments from PI | Postdoc’s comments | Other resources |
|  |  |  |  |  |
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|  |  |  |  |  |

You may use the information obtained from your skills, values and interests assessment exercises in Individual Development Plan workshop to articulate your goals.

What are your long-term career goals? Describe your timeline for achieving them?

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Long term goal | Anticipated timeline | Support from PI | Postdoc’s role | Other resources |
|  |  |  |  |  |
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|  |  |  |  |  |

What further research activity or other training is needed before it is appropriate to start a job search?

When do you intend to begin a job search? ( Can be an estimate).

ADDITIONAL NOTES AND COMMENTS

Postdoc

PI:

**APPENDIX B**

**Office of Postdoctoral Affairs**

**Penn State University**

**Annual Postdoc Evaluation Form**

I.

Name: Department/Center

Date of appointment (in current lab): Select one: Scholar/Fellow

Date of review:

Faculty members and postdocs can discuss and add modify the annual evaluation form criteria specific to their research or lab/group.

II. Core criteria for evaluation

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| Criteria  | Needs Improvement |  | Successful |  | Exceptional |
| Research |  |  |  |  |  |
| Publications |  |  |  |  |  |
| Presentation |  |  |  |  |  |
| Other |  |  |  |  |  |
| Comments |  |

III. Factors related to performance

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Scientific Knowledge**  | Needs Improvement |  | Successful |  | Exceptional |
| Broad knowledge base of science |  |  |  |  |  |
| Analytical Approach to defining scientific questions |  |  |  |  |  |
| Design of Scientifically Testable hypothesis |  |  |  |  |  |
| Comments |  |  |  |  |  |
| **Research skills** |  |  |  |  |  |
| Designing experiments |  |  |  |  |  |
| Data Analysis and Interpretation |  |  |  |  |  |
| Statistical analysis |  |  |  |  |  |
| Comments |  |
| **Execution of Research** | Needs Improvement |  | Successful |  | Exceptional |
| Efficiency of performing experiments |  |  |  |  |  |
| Productivity |  |  |  |  |  |
| Prioritization |  |  |  |  |  |
| Quality of work (accurate, thorough) |  |  |  |  |  |
| Other |  |  |  |  |  |
| Comments |  |  |  |  |  |

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Communication** | Needs Improvement |  | Successful |  | Exceptional |
| Writing skills |  |  |  |  |  |
| Basic Editing skills |  |  |  |  |  |
| E-mail communication |  |  |  |  |  |
| Presenting research/oral communication  |  |  |  |  |  |
| Routine communication in day-to-day operations |  |  |  |  |  |
| Other |  |  |  |  |  |
| Comments |  |  |  |  |  |

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| --- | --- | --- | --- | --- | --- |
| **Interpersonal skills** | Needs Improvement |  | Successful |  | Exceptional |
| Maintaining positive relationships with colleagues in the group |  |  |  |  |  |
| Understanding and demonstrating lab/group/workplace etiquette |  |  |  |  |  |
| Upholding commitments and deliverables |  |  |  |  |  |
| Other |  |  |  |  |  |
| Comments |  |

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| Learning Skills | Needs Improvement |  | Successful |  | Exceptional |
| Seeks mentoring |  |  |  |  |  |
| Identifies gaps and creates learning plans |  |  |  |  |  |
| Participates in training/professional development/career development activities |  |  |  |  |  |
| Other |  |  |  |  |  |
| Comments |  |  |  |  |  |

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| Overall evaluation |  |  |  |  |  |

IV. Complete, acknowledge and sign as appropriate:

Dr. \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ has not been reappointed.

Dr.\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ has been reappointed until \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_.

Acknowledgements:

My mentor and I have discussed the evaluations.

Signature of Postdoc: \_\_\_\_\_\_\_\_\_\_\_\_\_ Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Signature of Faculty mentor: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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

**APPENDIX C**

**PERFORMANCE IMPROVEMENT PLAN**

**Performance improvement plan/template letter when expectations of faculty PIs are not being met by the postdoc.**

**Faculty need to discuss with their respective college HR Strategic partners before implementing a Performance Improvement Plan**

**Letter needs to be on the letter head of the faculty member.**

Dear Dr.\_\_\_\_\_\_\_\_\_\_\_

This letter shall serve to document the details of our meeting on ­­­­­­­­­­­­­­­\_\_\_\_\_\_\_\_\_\_\_\_\_\_ in which you were informed that your performance is not meeting my expectations.

I have evaluated your performance since you have joined my lab on \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_. I have conveyed my expectations to you in our meetings on \_\_\_\_\_ (dates)\_\_\_\_\_\_ and emails on \_\_\_\_\_\_\_(dates). Specifically, you have not been able to demonstrate satisfactory performance in the areas of \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

As we discussed on (date)\_\_\_\_\_\_\_\_\_\_\_, I will provide you with a limited period of time to improve

your performance to a satisfactory level. Over the next \_\_\_\_\_weeks/\_\_\_\_\_\_\_months, I will evaluate your performance closely. We will meet weekly to discuss your performance and your progress during this period with respect to the projects and goals listed below. It is my expectation that you will provide me with weekly written progress reports that will update me on your progress.

Your weekly progress reports should include experiments performed, data you have generated, \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ and any other information in order to document that you are on track to satisfy the expectations and goals outlined below.