

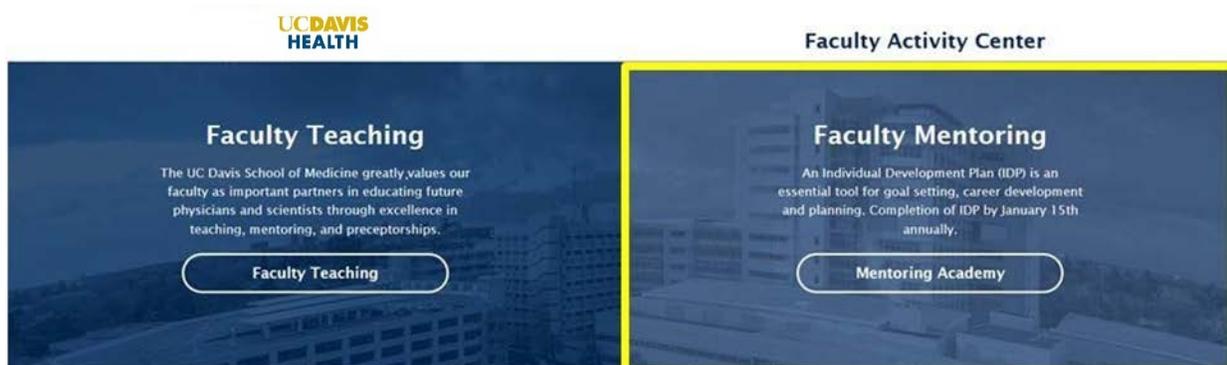
MENTORING ACADEMY FOR RESEARCH EXCELLENCE (MARE)**INDIVIDUAL DEVELOPMENT PLAN MANUAL
FOR MENTEES (JUNIOR FACULTY)**

Welcome Mentees to the online Individual Development Plan (IDP) application manual. There are two entry points to the online application; these entry points are based on your IDP Role.

- Mentees will use the Mentee dashboard to create, submit and manage their IDPs
- Mentors will use the Mentors dashboard to review and monitor IDPs that their Mentees have submitted

Access

Mentoring Academy for Research Excellence online Individual Development Plan (IDP) at the Faculty Activity Center <https://fac.ucdmc.ucdavis.edu/activity-center/>

**Contact Information**

For questions related to how to use the application or to report error/bugs contact MARE at: hs-mentoringacademy@ucdavis.edu

Academic Action Questions Contact:

- Your mentor
- UC Davis Health Academic Personnel website: <http://health.ucdavis.edu/academicpersonnel/>
- Contact Academic Personnel: 916-734-4610

Mentees

This IDP application was designed for junior faculty; however, any 'Active' UC Davis Health Faculty who are in the Faculty Information System (FIS) can use this online IDP.

To access the IDP one must have a Kerberos log in and be in the Faculty Information System (FIS). If you are seeing an error when you try to access the Mentee Dashboard, it means that the system could not validate that you are a UC Davis faculty member. If you feel you are seeing this in error, contact your department or MARE for assistance.

The IDP has 11 Steps. At this time, Steps cannot be accessed in random order; you are restricted to a linear progression between Steps. The “Next” button will be inactive until the required “Step” fields (indicated by an asterisk) are completed.

You don't have to complete the IDP in one sitting. You can start the IDP, work on it, save it, come back and work on it again, until you have completed and submitted the IDP.

If you have started and saved an IDP, the next time that you access the Mentee dashboard select the Edit button of the IDP you are working on in the system and the system will take you to the last section you were on of the applicable IDP. Please use the ‘Previous’ and ‘Next’ buttons to navigate throughout the IDP.

Look for the Question Mark boxes throughout the IDP which will provide basic information about a field, if you click on the box.

Prior to starting the IDP, know:

- your *rank*,
 - your *series*
 - Do you know if you are eligible for academic action in the next two years?
 - If mentee is an Assistant Professor, any rank, or an Associate Professor up to Step 2 –the answer is yes.
 - If you have Academic Action Questions (series and promotion) information, contact:
 - Your Primary Mentor
 - Department Academic Personnel Coordinator
 - UC Davis Health Academic Personnel website:
<http://www.ucdmc.ucdavis.edu/academicpersonnel/>
 - Contact Academic Personnel: 916-734-6131
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TIPS FOR COMPLETING IDP

Step 1: IDP Introduction and Agreement

Take the time to read all the instructions for Step 1 to understand the Mentee and Mentor IDP process.

Mentee's Role in the Online IDP Process:

1. Conduct a realistic self-assessment of current skills and abilities, goals and a timeline for achieving those goals
2. Develop a mentoring team composed of:
 - a. Primary mentor (Required, must be a UC Davis Faculty member)
 - b. Additional mentors (Strongly recommended, UC Davis Faculty or external; including a mentor who is not in the mentees' division or department to provide additional career development advice, as they are less likely to have conflicts of interest)
 - c. Consult with your departmental, division or training program for assistance in identifying mentors or check the "Find A Mentor" tab on the Mentoring Academy for Research Excellence website
3. Once completed, submit the IDP (mentors with a Kerberos account will have access to view your IDP)
4. Incorporate suggested edits or updates by mentors to your IDP
5. Work with mentor(s) to schedule meetings per schedule as indicated in the IDP
6. Inform your mentors that they may need to look in their Clutter or Junk files for the emails from the system

Step 2: Mentee Information

Enter a title that will help you recall this document in the future, (e.g., Doe-2017-ver1).

Prior to starting the IDP, know:

- your *rank*,
- your *series*
- Do you know if you are eligible for academic action in the next two years?
- Is your dossier ready? Do your efforts line up with your goals?

Who to ask for help:

Consult your mentor, Department Chair or the Academic Personnel Coordinator in your department for any questions related to academic action.

All required information must be completed on Step 2 in order to access the rest of the IDP steps. System is set up so that you cannot skip steps, you must go linearly through steps.

Individual Development Plan and Agreement

Step 1 IDP Introduction	<input checked="" type="checkbox"/>
Step 2 Mentee Information	
Step 3 Primary Mentor	
Step 4 Additional Mentors	
Step 5 Personal & Institutional Goals	
Step 6 Research	
Step 7 Clinical Care	
Step 8 Teaching	
Step 9 Service & Self-Development	
Step 10 Time Allocation	
Step 11 Complete IDP	

Mentee Information * Required field
Next button will enable when all required fields are complete.

* IDP Title: ?

* Name: Julie Schweitzer

* Email: jschweitzer@ucdavis.edu

* Phone:

* Rank: Professor

* Series: Clinical X

* Department: Psychiatry and Behavioral Science

Division: Psychiatry and Behavioral Sciences

Primary Center Affiliation: ?

Step 3: Primary Mentor

Primary mentors must be a UC Davis employee. Mentor name and email address is required.

Individual Development Plan and Agreement

Step 1 IDP Introduction	<input checked="" type="checkbox"/>
Step 2 Mentee Information	<input checked="" type="checkbox"/>
Step 3 Primary Mentor	
Step 4 Additional Mentors	
Step 5 Personal & Institutional Goals	
Step 6 Research	
Step 7 Clinical Care	
Step 8 Teaching	
Step 9 Service & Self-Development	
Step 10 Time Allocation	
Step 11 Complete IDP	

Primary Mentor Information * Required field

Please complete the following section for your primary mentor. Primary mentors must be a UC Davis faculty member. Additional mentors do not have to be a UC Davis faculty member.

Identify the applicable areas in which the mentor will provide guidance.

Primary Mentor

* Mentor Name:

* Email:

Phone:

Department:

* Topics to be addressed in mentoring session (check all that apply)

- Teaching
- Research
- Self-Development
- Clinical Care
- Work/Life Balance
- Networking
- Service
- Leadership

* Frequency of meetings (check one)

- Weekly
- Monthly
- Bi-monthly
- Quarterly
- Bi-annual
- Annual

* Information to be provided by the mentee prior to each meeting (check all that apply)

- Outline of topics to be discussed with supporting documents
- Prior meeting notes/minutes
- Updated CV (new additions highlighted)
- Data/Manuscripts - including drafts and other written documents
- Teaching/Curriculum
- Case Studies
- Other (Please specify):

Step 4: Additional Mentor

The most effective mentoring experience is accomplished with a team. At minimum we suggest selecting two mentors; one being someone that knows your content or clinical area and the second being someone that can assist you with career development and/or work-life integration—preferably with someone outside of your department. There is no limit to the number of mentors that you can have.

Additional mentors do not have to be UC Davis faculty, but you will have to manually input their information. Also, in order for your non-UC Davis mentor to review your IDP, you will have to provide them with a copy of your IDP for review as they will not be able to access the database.

If you have chosen “Other” you must enter text to explain what “Other” is before the system will allow you to proceed.

Step 5: Personal and Institutional Goals

If you are unfamiliar with the promotions or merits process, contact your department Academic Personnel Coordinator prior to completing Step 5.

Sample of information Step 5 asks:

Personal and Institutional Goals

* Are you eligible for academic action in the next two years? 

* Please check all that apply:

Merit

Appraisal

Promotion

Step 5's section is designed for you to consider and identify broad professional goals over the next few years. Goals should be broad as you will be inputting specific goals under Steps 6-9. Use the IDP as a guide for your conversations with your mentor, or Chair/Division head.

Do your efforts line up with your goals?

One goal per text box is ideal. You can add additional goals. Once you have saved your goal, you will then be able to edit, delete or add goals.

What are your short-term career goals (1-3 years)?

(Sample: Open new specialty clinic; become recognized nationally for work in XXX)

Step 5: Personal and Institutional Goals (continued)

Required Goals:

* What are your short-term career goals (1-3 years)? (e.g., Develop lecture series for residents on XXX; Become fully independent with my own research laboratory)

Goal
<div style="border: 1px solid #ccc; height: 60px; width: 100%;"></div> <p>Character Limit: 500</p>
<input type="button" value="Add Another Goal"/>

* What are your long-term career goals (5-10 years)? (e.g., Become nationally recognized for work in XXX)

Goal
<div style="border: 1px solid #ccc; height: 60px; width: 100%;"></div> <p>Character Limit: 500</p>
<input type="button" value="Add Another Goal"/>

Optional Goal:

List other goals and consider discussing them with your Chair/Division head so that they are aware of your goals and can assist you in achieving them.

Step 6: Research and Research Related/Creative Activities (Optional)

Know the criteria required for your series—what is required, what is optional. If you are unsure, contact your mentor or your department Academic Personnel Coordinator.

List each activity or project on a separate line.

Step 6: Research and Research Related/Creative Activities (continued)

Research and Research Related/Creative Activities (Optional)

Conducting basic science and/or clinical research, presentations, publications, application for and receipt of grant support, copyrights and patents.

*Please complete this section if your Academic Series requires Research and Research Related/Creative Activities.

* **Project Title:**

* **Project Description:**

Please describe the focus of your scholarly activity.

Character Limit: 250

* **Target Completion Date:**

* **Anticipated Products:**
(check all that apply)

- Manuscript
- Grant
- Presentation
- Clinical Trial
- Other (Please specify):

* **Identify resources, barriers, collaborators and time commitment needed to achieve goal(s):**

Character Limit: 500

Save

Cancel

Know the criteria required for your series—what is required, what is optional. If you are unsure, contact your mentor or your department Academic Personnel Coordinator.

List each activity or project on a separate line.

Step 6: Research and Research Related/Creative Activities (Optional)

Know the criteria required for your series—what is required, what is optional. If you are unsure, contact your mentor or your department Academic Personnel Coordinator.

List each activity or project on a separate line.

Research and Research Related/Creative Activities (Optional)

Conducting basic science and/or clinical research, presentations, publications, application for and receipt of grant support, copyrights and patents.

*Please complete this section if your Academic Series requires Research and Research Related/Creative Activities.

* **Project Title:**

* **Project Description:**

Please describe the focus of your scholarly activity.

Character Limit: 250

* **Target Completion Date:**

* **Anticipated Products:**
(check all that apply)

- Manuscript
- Grant
- Presentation
- Clinical Trial
- Other (Please specify):

* **Identify resources, barriers, collaborators and time commitment needed to achieve goal(s):**

Character Limit: 500

Save

Cancel

Step 7: Clinical Care (Optional)

If you provide clinical care, complete Step 7. Otherwise proceed to Step 8.

Clinical Care (Optional)

* Required field

Striving for exceptional patient care, development of new techniques, clinical programs, related clinical activities, achieving clinical budget performance expectations (as applicable to academic series).

What are your goals?

Goal
<div style="border: 1px solid #ccc; height: 100px; width: 100%;"></div> <p>Character Limit: 500</p>
Add Another Goal

[Previous](#) [Next](#) [Return to Dashboard](#)

Step 8: Teaching and Clinical Education

Teaching

* Required field

Teaching, student advising, training and/or mentoring others, continuing medical education (CME), new course development. At least one teaching activity is required. *

*Activity Type:

*Anticipated Activity Hours:

*Activity Title:

*Activity Description:

Please describe the focus of your teaching/mentoring activity.

Character Limit: 250

*Date Range for Activity:

Start of Date Range: End of Date Range:

*Anticipated Outcome:

Please describe anticipated outcomes and identify resources, barriers, collaborators and time commitment needed to achieve goal(s).

Character Limit: 1200

Save

Cancel

Sample drop down list for Teaching Activity Type:

*Activity Type:

- Select -
- Clinical Education
- Teaching Courses
- Curricular Development
- Lecture/Seminar/Lab/Other
- Special Advising
- Student Advising
- Mentoring

Step 9: Service and Self-Development

Service and Leadership

* Required field

Participation or leadership in committee membership, collegial activities or governance. Faculty are expected to contribute service to the department, the School of Medicine, the University, the profession and the community in some combination. Assistant Professors are expected to provide less service; as one's rank and step increase, expectations for service rise.

* At least one goal is required.

What are your goals?

Activity Type	Goal	Action
<input type="text" value="- Select -"/>		
<input type="text" value="Department/Division Committees"/>		
<input type="text" value="- Select -"/> <input type="text" value="Department/Division Committees"/> <input type="text" value="School/College Committees"/> <input type="text" value="Other Non-University Committees"/> <input type="text" value="Editorial/Advisory Boards"/> <input type="text" value="Other"/>		
<input type="button" value="Add Another Goal"/>		

Step 9: Self-Development – Networking, Work-Life Balance and Optimal Mentoring Team

Self-Development – Networking, Work-Life Balance and Optimal Mentoring Team

Faculty Development activities, leadership programs, CME training, earning advanced degrees, participation in professional academic associations or societies, developing professional contacts, consulting in one's field, expanding network contacts, balancing work and personal life, identifying and engaging optimal mentors.

* At least one goal is required.

What are your goals?

Goal	Action
<input type="text"/>	
Character Limit: 500	
<input type="button" value="Add Another Goal"/>	

Step 10: Time Allocation

Consider how does the time you spend align with your goals? How did you spend time this current academic year? “Realistic” time. How do you plan to spend your time the next academic year? “Ideal” time.

Total % of time must equal 100 for each column.

Faculty are encouraged to list barriers to completing goals in each category to be discussed

with your Mentors.

THIS IS A PARTIAL SCREEN SHOT OF THE TIME ALLOCATION STEP

Time Allocation

* Required field

Estimate how you allocated your time in the current academic year (i.e., July 1 – June 30) and indicate how you will change this time distribution for the coming academic year to accomplish all the goals stated in your IDP. Indicate any barriers you perceive to making time allocation adjustments.

Effort Distribution	Current Year		Projected Year		Potential Barriers Character limit: 250 (optional)
	2017	- 2018	2018	- 2019	
Research	<input type="text"/>	%	<input type="text"/>	%	<input type="text"/>
Teaching	<input type="text"/>	%	<input type="text"/>	%	<input type="text"/>
Clinical Care	<input type="text"/>	%	<input type="text"/>	%	<input type="text"/>

Step 11: Complete IDP and Submit

Once you submit the IDP to your mentor, you can no longer edit this version of the IDP, unless your Mentor returns it. Then you will be able to edit it. When you are satisfied with your IDP, click the Submit IDP button.

Your Primary Mentor and additional mentors with Kerberos accounts will receive an email that your IDP is ready for their review. The email may be directed to their Clutter or Spam folders; be sure to advise your mentor to look there, if they do not get a timely notice from the system.

The mentors will have the ability to review your IDP and return the document with suggested small changes/comments. Do not hesitate to contact your mentors to suggest and clarify their suggestions. If the IDP is returned to you with suggested changes, you will be able to edit your IDP and, once edited, you will then click submit and your IDP will be sent back to your Primary Mentor for acknowledgement/approval.

Once the Primary Mentor acknowledges/approves the IDP document, it will be locked and can no longer be edited. In the future, if changes are needed, or an update is desired, the form can be copied, edited and submitted. Alternately you can always create a new IDP document and submit that for acknowledgement. The Primary Mentor is the only mentor that can acknowledge/approve the IDP.

MENTORING ACADEMY FOR RESEARCH EXCELLENCE (MARE)

FAQs Mentee

Q. The Department/Division Mentoring Director select list on Step 2 is blank or I do not see my Department/Division Mentoring Director in this list.

A. This select list is populated from the Faculty Information System. If this list is blank it is because the data are not populated in the Faculty Information System. Contact the Mentoring Academy for additional assistance.

Q. I cannot get past Step 2.

A. If you are not in the Faculty Information System (FIS) you will not be able to access the IDP. Contact your department human resources personnel, or your primary mentor.

Q. I cannot skip Steps.

A. Steps cannot be accessed in random order; you are restricted to a linear progression between Steps.

Q. My IDP was returned. What should I do next?

A. Returned IDP indicates that your mentor would like you to make some revisions to your IDP. Click on the “View Reason” button on the Mentee Dashboard to read a short note about why the IDP was returned or what action your mentor would like you to take. It is recommended that you make an appointment with your mentor, to discuss your IDP further, if needed.

Once you understand why the IDP was returned, access the Mentee Dashboard, click on “Edit” and make the necessary updates. Then you can resubmit it for review. (Please note: The “View Reason” button will disappear once you start making your revisions.)

Q. I am not able to edit my IDP.

A. Once an IDP has been “Acknowledged/Approved” by your Primary Mentor it is considered final and cannot be edited. If you would like to make additional updates to an “Acknowledged/Approved” IDP, make a copy of the “Acknowledged/Approved” IDP, rename it and make changes to this “new” IDP.

Q. How can I print or email a copy of my IDP?

A. Mentees, once you have started an IDP it will appear as “In Progress” on the Mentee Dashboard. Click on the “View” button to open a PDF version of that IDP. You can then print or email a copy of the PDF. (Please note: Mentees can view their IDP regardless of the status. However, Mentors are not able to view In Progress IDPs.)