

IDP Instructional Guide

Graduate students who engage in career planning and goal setting during their academic careers set themselves up for greater productivity, increased satisfaction, and reduced stress.¹ This process, often known as Individualized Development Planning (IDP), provides a framework for trainee-initiated reflection, goal setting, and productive mentoring conversations. The IDP process helps provide clear expectations for students and their mentors and is currently promoted by leading organizations in higher education as a best practice.² Students take ownership of the planning process and are responsible for maintaining records to share with their advisor(s), mentor(s), program faculty, and the Graduate School. This process also enables programs to conduct systematic annual reviews and intervene when challenges arise.

Guidelines for Students

Use the IDP form to provide background information, review and reflect on prior goals, and set new goals. As you move forward in goal setting and reflection, consider the following best practices:

- Prior to completing your goals
 - Think about the ways your skills, assets, values, and interests weave into your goals and possible pathways, using a web based IDP platform for help as needed: ImaginePhD.com and Myidp.sciencecareers.org include self-assessments and career exploration tools.³
 - Consider at least two career plans. Having two options ensures your short-term goals can be aligned to at least one long-term path, and accounts for the fact that many students change career plans during graduate school. It is critical to be working toward skill building that might prepare you for many paths forward.⁴
 - Review your milestone agreement and program requirements to ensure your proposed goals align.
- Make goals “SMART” (Specific, Measurable, Achievable, Relevant, and Time-Bound).
- Consider goals that
 - satisfy important program milestones (e.g., completing dissertation proposal)
 - focus on research progress and professional competencies, not coursework or grades
 - involve objectives that are important for you to achieve a long-term goal (e.g., submitting a paper for publication)
 - develop skills/knowledge/experiences (e.g. teaching a class, improving writing, gaining proficiency in research method)
- Solicit feedback from colleagues and mentors to ensure your goals are SMART and beneficial to career plans. Use an AI agent to help you refine your goals and make them SMART. Refine as necessary to make them relevant to you.
- The IDP is due annually for research doctoral students. To meet this requirement, we recommend that you work from scratch using the IDP template form every year rather than expanding the table each year (as this would result in a much longer document), but as long as the most recent, and forthcoming review period is fully included, either option is acceptable.
- The Graduate School hosts regular IDP workshops to help provide additional guidance that expands on information here:
 - Students can access a recording of a past workshop (UTEP login required; passcode: ANP4K!S4) at <https://utep-edu.zoom.us/rec/share/J73TqnPI9999n-5v3te3Bf6fL6lPELOa1dOKBzZMwdeI1vCflppqeNm8R4-sQjax.8FDtaotcjTvDpFet>. Upcoming hyflex (in person and zoom) workshops can be found on MineTracker here: <https://minetracker.utep.edu/organization/gradschool>

Guidelines for Advisors/Mentors/Committees

- Review student progress toward past goals and provide positive, constructive feedback for achievements, suggestions, or advice if goals are not met.
- Review future goals to ensure that they
 - are SMART
 - correspond to program’s milestone agreements
 - are beneficial to trainee’s career goals
- Provide professional and constructive feedback that helps trainees make progress and may be viewed by others in the department or other campus academic units such as the Graduate School.
- Schedule follow-up conversations and/or agree on accountability plan(s).

¹ Davies, 2006; Ng *et al*, 2005; Abele and Wiese, 2008; Smith *et al*, 2006.

² The Federation of American Societies for Experimental Biology, the National Institutes of Health, the US Federal Office of Personnel Management, the Council of Graduate Schools, and the National Postdoctoral Association.

³ MyIDP---ScienceCareers is recommended for STEM students and ImaginePhD is recommended for those in the Humanities & Social Science. These platforms provide a way to take assessments, explore resources for different career paths, and develop a dynamic list of degree completion, professional, and personal goals. Some fields also have more specific versions, and if additional or different platforms are needed, reach out to us at GradSchool@utep.edu to request additional IDP web tool links or check out the workshop recording linked above.

⁴ Fuhrmann *et al*, 2011.

GENERAL NOTES

- Mentor
 - For doctoral students, the mentor should be the person who will be guiding your scholarship/research for the coming year.
 - For situations where students do not have dedicated mentors (including the first year in rotation-based programs), the program director or coordinator should consult with students about which individual should serve in the mentor role for IDP review.
- Review periods can be no longer than one year
 - Programs may establish shorter review periods (e.g., 6 months), but periods exceeding one year are not permitted. The Graduate School expects each continuing doctoral student to submit an IDP by June 1 annually, dated no later than January 1 of the current year and including short-term goals spanning until the next June 1 due date. Programs should conduct their review of student IDPs in the spring semester annually.

1. PROGRAM MILESTONES

- Program Leadership: Consider adding a checklist here that has all major milestones, expected completion period for each milestone, and a place for students to indicate when it is completed.
- Students: If your program does not have a checklist, you should review your milestone agreement and add all milestones that were just completed and upcoming.

2. CAREER & LONG-TERM GOALS AFTER GRADUATION

- Short-term goals should be aligned to your long-term career goals. Think about the skills and accomplishments each path requires (e.g., for an R1 faculty position: how many publications, what methodological expertise?) and use those to shape your IDP goals.
- Research suggests that many students change career goals during their graduate careers. We want you to always have two options listed, especially in your early years, so you can think about the accomplishments and skills that are necessary for those positions (many may overlap but not all).

3. STUDENT COMMENTS

- This section is a place where students can provide context and background that can help provide insight into other components of this IDP.
- This section can be especially important if there are external factors that made achieving some goals difficult/impossible in the past year. Goal setting is also best if goals are difficult (but achievable) so this section can also be used to discuss future goals and which ones might be more difficult to obtain.
- **Medical Issues: Do not discuss confidential medical issues on this form. These forms are all uploaded to our student information system. If you experience any medical issues that make it difficult to progress, it is very important that you visit CASS and have them provide you with an accommodation form. You are encouraged to attach CASS accommodation forms to this IDP as evidence that there was some issue that inhibited your progress in the year. International students should also consult with the Office of International Programs if medical issues are impacting their academic progress and/or require a reduced course load.**

4. SHORT-TERM GOALS FROM PRIOR REVIEW PERIOD

- Students who are in their first year should leave this section blank.
- Expected deadline and Goal Description must be copied from the preceding year's IDP (all of goals from previous IDP **must be** listed, even if not accomplished). You are welcome to add goals on which you worked that were not listed in the previous IDP.
- Any goals related to program milestones that were mentioned in the prior period but were not completed by prior review period deadlines should be addressed.

5. SHORT-TERM GOALS FOR THE UPCOMING REVIEW PERIOD

- Goals must always include relevant milestones for the coming review period.
- Deadlines for goals must have both the month and year (e.g., May 2026) to indicate when the goal is expected to be completed.
- There must be goals for every semester in the review periods (e.g., if IDP is completed by Mar. 2026, there must be goals for Spring 2026, Summer 2026, Fall 2026, and Spring 2027).

- There are several ways to provide sufficient detail in the short-term goals section. Goals can be organized by time (e.g., January vs. February goals) or by type (milestone vs. professional development vs. publication). Aim for enough detail that SMART principles can be applied to any milestone due in the review period.
 - Large goals can be broken into sub-goals with their own deadlines. For example, a dissertation proposal writing goal could be broken into: complete literature review (Month 1), finalize methods design (Month 2), submit full draft to committee (Month 3). See the workshop recording for additional examples.
 - **Students approaching critical completion deadlines (e.g., funding end dates, including I-20 expiration, or doctoral time limits) should structure their goals with program completion as the primary organizing principle.** In these cases, every short-term goal should be explicitly tied to dissertation completion. For example, a paper or manuscript goal should identify its specific relationship to the dissertation, and activities that cannot be clearly connected to completion progress should be deferred.

6. MENTOR AND/OR COMMITTEE COMMENTS

- Mentors must provide some feedback at least in one location on the document. **Mentor feedback is especially important if goals related to milestones were not met.**
- Programs vary regarding the process for feedback and can consult with the Graduate School further on best practices for review based on individual program needs.