



Crafting a Successful Path Forward: Professional Goals and Action Plan

Workshop Outcomes

- Participants will understand the purpose and value of engaging in self-reflection and self-evaluation.
- Participants will learn to craft an action plan that allows them to better articulate their professional goals through a forward-looking narrative.

Resources for the Facilitator (may also be assigned to participants)

- Baker, Vicki L. *Charting Your Path to Full: A Guide for Women Associate Professors*. Rutgers UP, 2020. Targeted specifically on the challenges facing women associate professors, Baker's book provides tools, resources, and concrete action steps for success. Readers will find a robust source for helping women academics achieve their goals.
- Berry, Wendell. "[Solving for Pattern](#)." *The Gift of Good Land: Further Essays Cultural & Agricultural*. North Point P, 1981. Berry is admittedly writing about agriculture; however, his steps for finding solutions to challenging problems translates beyond farming. Readers will find a concise approach to tackling complex, forward-looking issues.
- Gawande, Atul. *The Checklist Manifesto*. Picador, 2010. Gawande reveals the value of the checklist in breaking down complex projects into manageable tasks. Readers will find a compelling case for how the checklist approach can improve not just our work but our understanding of our work.
- Haviland, Don, Anna M. Ortiz, and Laura Henriques. *Shaping Your Career: A Guide for Early Career Faculty*. Stylus Publishing, 2017. The authors break down the facets of academic life and provide concrete examples and resources for success in these areas. Readers will find a valuable guide to creating an action plan at the early stages of their career.
- "[Individual Development Plan](#)." *University of North Carolina: Center for Faculty Excellence*. This resource offers several different formats and templates for creating an individual development plan. Readers will find a variety of ways to specifically and explicitly engage in goal-setting.
- Kelly, Vickie. "[Take Control: Planning Your Professional Development](#)." *Faculty Focus*, Aug. 5, 2011. Kelly explains how to create a professional development plan. Readers will find a step-by-step guide of how to consider the goals, activities, cost, anticipated results, and actual results of a concrete action plan. Providing an example of how to create a professional development plan, Kelly offers a step-by-step guide for
- Klein, Gary. "[Performing a Project Premortem](#)." *Harvard Business Review*, Sept. 2007. Klein provides a template for completing a premortem, an imagined situation where a project has already failed. Readers will find a strategy for considering worst-case scenarios in their action plans so that they can counter them before they happen.
- Ruark-Pope, Rebecca. *Agile Faculty: Practical Strategies for Managing Research, Service, and Teaching*. Univ. of Chicago P, 2017. Pope-Ruark illustrates how the agile work strategies that have revolutionized the business world can be adopted by faculty. Readers will find concrete ways to structure and plan the various aspects of their work life as faculty.

Product

Individual Development Plan (draft)

Before The Session

There are a number of activities and tasks that participants can be assigned to complete prior to the start of this workshop. In determining what to assign, the facilitator should consider not only their/the workshop's goals but the needs and experience of the participants. The more that participants are able to engage in guided self-reflection and self-evaluation prior to the workshop, the more productive the workshop activities will be. Possible activities and tasks may include:

- completing assigned reading(s). These can include completing readings from the resources provided above and may (or may not) include pre-session conversations.

- engaging in reflective questions. Asking participants to complete this prior to the session (or at the outset) can help facilitate the self-reflection and self-evaluation needed prior to developing an action plan. The following list is not exhaustive, but may be helpful as a starting point.
 - What is the thing that interests me *right now*?
 - What do I want to achieve?
 - Where do I want to go?
 - How do I want to make a difference?
 - What excites me about my teaching? research? service? administrative work?
 - When I imagine five, ten, or even twenty years from now, what does my life look like?
 - How would I complete the following sentence: If I accomplish only one thing in my professional life I want it to be...?
 - How do my goals align or push against the goals of my field, department, institution, or professional organization?
 - How have my previous activities addressed my future ambitions?
 - What would I need (from myself, my department, my institution, my community, my professional organization) to succeed in my current and future goals?
 - What would I need an individual development plan to include/offer me so that it does not feel like "busy work" to complete one?
 - How do my short-term and long-term goals align and/or push against each other?
 - What opportunities do I need in order to reach my goals? What do I need in order to take advantage of these opportunities?
 - How do I define a successful faculty career? What are the benchmarks for success? How will I assess whether or not I've been successful in meeting my goals?
 - How can I create a game plan for my future career development?
 - How can I maximize the value of my routine responsibilities (e.g., committee assignments, courses I teach) to help me meet my goals? Are there particular responsibilities that might be most valuable to me?

- defining their goals. It will be helpful if participants can come to the workshop having already written down several future goals that they would like to achieve in various aspects of their faculty career (teaching, research, and service/administrative roles). Answering the reflective questions (above) may help them begin articulating their goals. It is not necessary that these goals be fully developed or perfectly expressed; however, participants will most benefit from this workshop if they have spent some time prior to the session considering what is important to them, what they would like to achieve in the future, and how they would measure success in accomplishing specific goals.

Pre-Session Assessment Questions

I feel confident about creating a forward-looking action plan that outlines my professional goals and the concrete steps needed to achieve these goals.

[Not at all; Slightly; Moderately; Very; Extremely]

I know how to build different ranges of development plans (e.g., 1-year, 3-year, 5-year, 7-year, and long-term) for my teaching, research, service, and other areas of professional life (such as administrative roles at the departmental, institutional, or professional organization level.

[Not at all; Slightly; Moderately; Very; Extremely]

I understand how to draft an individual development plan that allows me to consider how to find and meaningfully incorporate existing responsibilities and possible opportunities.

[Not at all; Slightly; Moderately; Very; Extremely]

Workshop Outline

The following is a proposed outline for facilitating a workshop on helping faculty think intentionally and critically about their professional goals and how to create a successful action plan. Depending on the desired length of the workshop, the lengths of the various segments may be modified.

Additionally, certain aspects of the workshop—such as the SWOT personal analysis and the pre-mortem—can be completed as homework prior to the workshop or follow-up activities completed after the workshop. Aspects of this workshop have been adapted from the resources cited above.

00:00 (15 m.)

Introduction to creating an Individual Development Plan

Goal: To help participants understand the purpose and value of creating a forward-looking action plan.

- The facilitator may choose to either directly present or invite the participants to discuss a number of possible topics, including:
 - The concrete benefits of creating an action plan: it can both articulate and create purpose, it can help break down big goals into manageable tasks, it can help faculty succeed in their goals, it allows faculty to transition from thinking/operating solely in the moment to thinking long term.
 - The potential objections (and why they are incorrect) that faculty may have about creating this plan (e.g., that it is too much work, that it is “busy work,” that the plan is for the institute not the individual, that it feels too ephemeral).
 - The ability of an action plan to help faculty transform their often backward-looking university assessments into forward-looking plans for their future successes.
 - The ways that an action plan can help faculty create a narrative that seeks to bind and connect the seemingly disparate activities, responsibilities, and work into a cohesive understanding of themselves, their accomplishments, and their future goals.

Goal: To help participants understand how to create concrete and achievable goals through the development of an action plan.

- The facilitator may choose to either directly present or invite the participants to discuss a number of possible topics, including:
 - Creating goals that are S.M.A.R.T. (Specific, Measurable, Achievable, Relevant, Time bound).
 - Differentiating between different lengths/durations of action plans (e.g., 1-year, 3-year, 5-year, 7-year, long-term).
 - Treating an Individual Development Plan (IDP) as a research project in which you consider “what is the thing that interests me?” and then finding the

concrete ways that you can become associated with something about which you are passionate.

00:15 (5 m.)

Activity: Free Write

Goal: To help participants think broadly about their future and what they hope to achieve.

- Participants should spend this time individually writing their response to a provided prompt. Facilitators may choose one of the provided pre-session reflective questions, allow participants to pick from the list, or create another prompt for their participants to answer. Ultimately, this free write should prime participants for the work they will be doing in this session.

00:20 (10 m.)

Activity: SWOT Personal Analysis (10 minutes)

Goal: To help participants further engage in self-reflection and self-evaluation; this activity will assist them in creating goals that will better align with their own needs, priorities, and situations.

- Participants should spend this time individually completing the SWOT Personal Analysis. (See the attached Worksheet 1). Completing this analysis will allow participants to consider their individual strengths and weaknesses as well as the larger opportunities and threats they may face.

00:30 (20 m.)

Activity: Individual Development Plan (IDP)

Goal: To help participants break down an action plan into SMART (specific, manageable, actionable, relevant, timebound) goals.

- Participants should spend this time individually completing the Individual Development Plan. (See the attached Worksheet 2). Completing this plan will allow participants to frame goals into short-term and long-term plans and to consider ways that they will accomplish their goals and assess their success.

00:50 (15 m.)

Activity: Feedback and Brainstorming

Goal: To allow participants an opportunity to receive feedback on their Individual Development Plan and to consider how best to align their SWOT Personal Analysis with their plan.

- Paired participants should review each other's SWOT Personal Analysis and Individual Development Plan. They should then engage in discussion of what patterns they notice, where they see strong alignment (or misalignment) between the two documents, and what questions they have. In addition to serving as an opportunity for feedback, this activity can also be used as a brainstorming session to consider what existing opportunities and resources (at the institute or in the wider community) might be available to help the participants meet their goals.

1:05 (20 m.)

Activity: Pre-Mortem Discussion

Goal: To allow participants to explicitly address anxieties they may be facing about achieving their goals and to engage in a backward design approach to creating a successful action plan.

- Participants can either begin by completing individual pre-mortems or the participants can work through the pre-mortem in small groups or as an entire workshop. (See the [MITRE Innovative Toolkit Pre-Mortem worksheet](#).) This activity should allow the

participants to imagine that their action plan failed and then consider what might have caused that to happen. Part of this time should be spent considering what the participants can do to ensure that this pre-mortem does not become a post-mortem.

1:25 (5 m.)

Activity: Free Write

Goal: To help participants begin strategizing next steps regarding their professional goals.

- Participants should spend this time individually writing their response to a provided prompt. Facilitators may choose one of the provided pre-session reflective questions, allow participants to pick from the list, or create another prompt for their participants to answer. Ultimately, this free write should point faculty toward their future actions.

Assign Post-Session Assessment Questions.

Post-Session Assessment Questions

I feel confident about creating a forward-looking action plan that outlines my professional goals and the concrete steps needed to achieve these goals.

[Not at all; Slightly; Moderately; Very; Extremely]

I know how to build different ranges of development plans (e.g., 1-year, 3-year, 5-year, 7-year, and long-term) for my teaching, research, service, and other areas of professional life (such as administrative roles at the departmental, institutional, or professional organization level.

[Not at all; Slightly; Moderately; Very; Extremely]

I understand how to draft an individual development plan that allows me to consider how to find and meaningfully incorporate existing responsibilities and possible opportunities.

[Not at all; Slightly; Moderately; Very; Extremely]

Optional Additional Activities

There are a number of activities and tasks that participants can be assigned upon completion of this workshop. In determining what to assign, the facilitator should consider how this workshop fits within their larger faculty development offerings as well as the participants' interest/commitment to this topic. The more that participants are provided with additional resources as well as opportunities to practice and receive feedback on creating action plans, the more likely they will be to engage in these practices regularly and effectively. Possible activities and tasks may include:

- completing assigned reading(s). These can include completing readings from the resources provided above and may (or may not) include post-session conversations.
- participating in regular small-group sessions held throughout the term. These sessions can take many forms, including an accountability group, a faculty learning community, a reading group, or a mentorship circle.
- additional workshops and opportunities. These can focus on a number of topics, including SCRUM/agile project management; creating action plans for different demographics (early career, midcareer, BIPOC, women, LGBTIA faculty); revising your development plan; planning your pivot; building goals for the specific aspects of faculty life (teaching, research, service/administrative); and assessing your development plan. Additionally, these workshops and opportunities can bring in multiple campus stakeholders as resources for advice, feedback, and support.

Action Plan Workshop--Worksheet 1 (SWOT Personal Analysis)

<p style="text-align: center;">S</p> <p style="text-align: center;">Strengths</p>	<p style="text-align: center;">W</p> <p style="text-align: center;">Weaknesses</p>	<p style="text-align: center;">O</p> <p style="text-align: center;">Opportunities</p>	<p style="text-align: center;">T</p> <p style="text-align: center;">Threats</p>
<p>What skills do you do well? What qualities positively separate you from others? What positive behaviors or attributes do you possess? What resources or connections do you bring to the table?</p>	<p>What skills, behaviors, or attributes do you wish to acquire or improve? What resources or connections are you lacking or missing? What are the gaps in your knowledge?</p>	<p>Where is the growth opportunity for you? What are emerging or unserved areas for exploration? What funding or support opportunities are available to you?</p>	<p>What barriers or obstacles exist that might hinder your success or require additional work? What are the changes (in your department, institute, field, external world) that you need to navigate?</p>

Action Plan Workshop--Worksheet 2 (Individual Development Plan)

	Goals	Experience/ Skills/Knowledge Needed	Activities/ Action Steps to Complete	Resources Needed (time, money, support)	Anticipated Results	Actual Results	Timeline
Short-Term Goals	1.						
	2.						
Critical for current stage or position.	3.						
	1.						
	2.						
Mid-Term Goals (4-7 years)	3.						
	1.						
	2.						
Important for growth in current stage or position.	3.						

Long-Term Goals	1.								
	(8+ years)	2.							
	Helpful for larger career trajectory and plans.	3.							