

# OUHSC Faculty Leadership Program

## Individual Faculty Career Development Plan (The IFcDP)

### A GUIDE FOR BUILDING THE FACULTY PORTFOLIO

University of Oklahoma Health Sciences Center

Office of the Vice Provost for Academic Affairs & Faculty Development  
Office of the Senior Vice President and Provost



## The University of Oklahoma Health Sciences Center

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## How to Use this Guide

**B**est use of this guide is as part of your planned faculty development or mentoring activities. It is designed for early career faculty and can be used by those in either tenure-track or non-tenure track appointments.

If you are a faculty member developing goals for your academic career and are (1) at the early stages of your first full time academic appointment, or (2) preparing for a significant shift in responsibilities use this guide as prompt to help you think through general and specific issues for discussion with your mentor/coach, or for negotiating with your unit leader, faculty peers or department chair.

Faculty members using this guide are encouraged to discuss goals, objectives, planned activities and results with a senior peer, seasoned mentor or their department chairperson.

Keep in mind that this guide is not intended to replace documentation required by your department or college for assessment of faculty progress. Rather it is laid out in worksheet format as a repository for your thoughts, ideas and reflections on the questions posed. It can be printed as the cover or excerpted as text materials for your career portfolio or academic advancement dossier. Suggested forms or pre-formatted items can be downloaded as PDF or Word files from the OUHSC Faculty Development website.

## A Note for Department Chairs and Faculty Mentors

If you are a mentor or coach for an early career faculty member you may want to use the questions and bulleted points in **Step 3b** of this guide on the “Annual Report Outline” worksheet.

The items noted are designed to frame a goal setting and feed-forward dialogue with an early career colleague that complements the annual review of accomplishments and feedback on strengths and areas for improvement.

If the faculty member’s home department uses a specific feedback form and/or annual report template, please direct the faculty member to a source for that information in advance of your meeting.



## Quick Facts about Academic Health Centers

- Academic health centers, comprising health professions schools (including allied health, dentistry, graduate studies, medicine, nursing, pharmacy, and public health), major research complexes, and owned or affiliated hospitals, health systems, or organized health services, are central to the nation's health and research workforce capacity
- On average, academic health centers employ 6,000 faculty and staff; in total, AAHC institutions enroll more than 300,000 students in health professions and graduate schools, building the workforce of tomorrow.
- 44% of AAHC institutions have at least one research park and/or business incubator to facilitate technology transfer, accelerate entrepreneurial ventures, nurture industry partnerships, and foster regional economic development.
- Academic health centers conduct a majority of the nation's clinical trials to evaluate the safety and efficacy of new treatments and technologies.
- With an average of almost 600 beds, AAHC institutions' teaching hospitals are among the largest hospitals and maintain a reputation for superior quality of services.

*Adapted from Source: AAHC 2011*

The logo consists of the word "intro" in a lowercase, sans-serif font. The letters "i", "n", and "t" are yellow, while "r", "o", and the second "o" are white. The logo is set against a dark red rectangular background.

## Facts about Faculty Life at an Academic Health Sciences Center

**A**cademic Health Centers, or AHCs, have a unique role in the landscape of higher education and health care. This role contributes to the expectations for faculty members whose careers begin, take shape, grow and evolve in these settings.

The promise of AHCs is expressed in this quote:

*“Academic health centers represent a unique combination of teaching, research, and patient care. This blend of academe and clinical care creates a perspective in which these multiple roles are not disparate, but rather contribute to a whole that is truly greater than the sum of its parts.”*

*Steve Wartman, CEO, AAHC*

### Faculty Life at an AHC

Faculty members at AHCs conduct cutting edge research and create a stimulating educational environment that can foster not only basic discoveries in the biosciences but also health care focused education, biomedical and translational research, applied sciences research, preventive and interventional care and clinical trials. In addition faculty members from the health professions are expected to provide excellent clinical care and contribute directly to training the next generation of health care professionals.

Teaching, research, patient care, and service are the watch words for faculty roles and responsibilities at an academic health sciences center. An academic career at an AHC can offer faculty more opportunity to make a difference than the traditional university setting. This guide will help you capture the difference!

To learn more about Academic Health Centers visit the Association of Academic Health Centers website:

<http://www.aahcdc.org/>

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# Step 1

## Preparing Yourself for Academic Career Advancement

*It is never too early to think about your future.*

As an early career faculty member at an Academic Health Sciences Center you have chosen to enter an environment rich with tradition *and* experiencing rapid change. Fortunately, you are in a setting where you and your colleagues can use your talents and skill for positive affect on both of these conditions. By establishing and maintaining important traditions you will help strengthen the quality of science and the values of the health professions. On the rapid change front your work as an educator, scientist or health professional becomes the source for discovery, application, integration and teaching of evidence based practices and contemporary health care. The potential for innovation is high. And, you can benefit from the results of your contributions by recognition through the academic advancement process. Preparation for academic advancement can begin as early as you wish. A disciplined approach on your part can save time and perhaps frustration as your eligibility for promotion or tenure review grows near.

Can you describe the difference between expectations for faculty with the following titles?

- Instructor
- Assistant Professor
- Associate Professor
- Professor

As traditions go each college and profession has a culture and history which influences the expectations of faculty. And with regard to the contemporary environment, it is rare for topics related to science, medicine, or health to be far from the daily news. Faculty at health sciences centers and professional schools are contributing to the discoveries and the problem-solving that will ultimately improve the health of individual patients and the public.

*This world of tradition and dynamic change is the environment within which your work as a faculty member will bear fruit. It is the context within which your achievements are considered*

*by your colleagues and peers as a candidate for advancement through the academic ranks from instructor, to assistant professor, associate professor and professor.*

As a new faculty member you may also be entering a new stage of life within your family and community. The formality of education and the earliest years of your professional life are ending and you are transitioning into roles of greater personal responsibility at work and possibly at home.

We hear more and more frequently that those starting careers are striving for greater “balance.” While 50-50 balance may not be the optimal goal, attending to what is important in each area can be better accomplished through mindfulness than it can through inattention. Part of preparing yourself to advance in your career should include attention to those aspects of your personal world, home and family life which enable you to feel fulfilled, satisfied and resilient — personal resilience is an attribute that can carry positively into work as well. Mindfulness in this means paying attention to what matters to you as an individual and in the context of your partner or spouse, children, parents and other meaningful relationships with family, friends and within your community and culture.

Let’s get started!

*Here are your worksheet headings:*

1. *What Matters to You?* Identify what you value.
2. *How are You Allocating Your Time?* Assess your current personal and professional time commitments.
3. *What’s Your Personal Mission and Goals?* Describe your passions and overarching (3-5 year) goals.
4. *Have You Named Your Benchmarks?* Identify the knowledge, skills, and behaviors needed to accomplish your professional and personal goals.



## What Matters to You?

**Questions to ponder.** Answering these questions may take a few minutes, a few hours or a few days. Be patient with yourself. Having a “quick” answer is not the objective. Your thoughts and notes will help you use the time with your mentor or coach more effectively.

**What do you value?** What are the environmental conditions (e.g., safety/ adventure/ productivity/ leisure etc.) and personal ways of being (e.g., engaged, connected, open and honest/ challenging/ joyful/ peaceful/ helpful/ focused, etc.) you want to maintain or increase in your life? What are the conditions/ways of being you want to decrease?

**What do you want to accomplish?** Think about the academic and non-academic roles you have and those you desire.

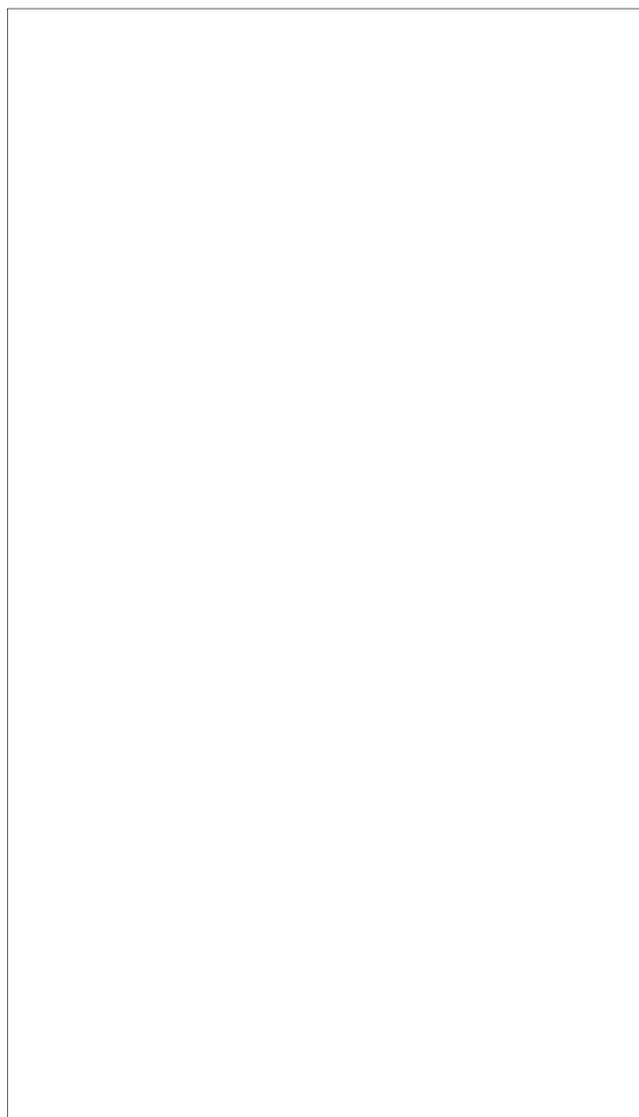
- Personal
- Family/Significant Others
- Career
- Community
- Other areas important to you

**Near term:**

1. **What will you need to start doing?** In the 12 months ahead what NEW actions will set you on a path to accomplishing the things you have noted?
2. **What will you need to stop doing?** In the 12 months ahead what current activities will you ELIMINATE so that your priorities reflect your values for home and work?

**Longer term: What will you need to start doing? What will you need to stop doing?** What specific steps will you take within the next 36 months to five years to address your values and the professional and personal roles you desire?

*Suggestion: If you're not sure where to start, see the resources list (p. 32) for link to Stephen Covey on You Tube.*





# How Are You Allocating Your Time?

Indicate the current and desired distribution of your time.  
Each column total should add to 100%

## Professional (Academic Career)

Current	Desired	Area or Responsibility
_____	_____	Teaching and Learner Development
_____	_____	Scholarship, Research, Creative Achievement
_____	_____	Patient Care and Clinical Leadership
_____	_____	University Service
_____	_____	Administration or Other service (e.g., seasoned faculty)
_____	_____	Other (specify the area): _____

**TOTAL PROFESSIONAL TIME COMMITMENT 100% (or less)**

Notes about my professional time allocation:

## Personal (Non-Academic/Life Goals)

Current	Desired	Area or Responsibility
_____	_____	Personal balance (including sleep, eating, exercise)
_____	_____	Home and family (spouse/partner, children, parents)
_____	_____	Community and other areas (specify) _____/____
_____	_____	Other (specify the area): _____

**TOTAL PERSONAL TIME COMMITMENT 100% (or less)**

Notes about my personal time allocation:

Increase—decrease—neutral

<b>Academic (Career):</b>	Current _____	Desired _____	Net Change _____			
<b>Non-Academic (Life):</b>	Current _____	Desired _____	Net Change _____			

## Step 2

# Personal Mission — Goals, Objectives, Activities and Results

*What is your personal mission statement? What are you driven to accomplish as an educator, clinician and scholar in your discipline?*

*What foci at the Health Sciences Center connect most closely to your personal mission?*

*What foci in your Department connect most closely to your personal mission? How does this align with your College mission?*

*For your academic success, who needs to be aware of these potential connections? What short and long-term results or outcomes may develop from your invested time and talents?*

An example of a personal and professional goal juxtaposition might be planning to adopt a child and writing a competitive grant renewal proposal. Each requires significant time investment and may have periods of high and low attention need when occurring concurrently.

**G**oals for each area of the academic mission need to be sufficiently broad to encompass multiple objectives, but not so broad that they are a global umbrella. Goals that are unique to interests, skills and intended contributions of the faculty member serve best.

Personal and professional goals included in the IFcDP are negotiated with different people. Identifying both in one plan affords the faculty member and mentor/coach with perspective on (a) how the goals align within and across professional and personal areas, and (b) what may require low, moderate, or significant attention during the IFcDP timeline.

Goal framing includes:

- ❑ Outlining specific goals and associated objectives.
- ❑ Articulating estimated percent-of-time commitment to each

- area of personal life and professional work.
- ❑ Defining tasks and timelines to be addressed each quarter.
  - ❑ Specifying desired and anticipated outcomes.

And, particularly important for professional goals:

- ❑ Identifying action items for calendar scheduling, and
- ❑ Recording achievements at year-end
- ❑ Updating the curriculum vitae.

A personal mission statement can serve as your internal compass and source to determine what activities are of highest personal/professional priority. Personal mission can evolve over time—it is not fixed forever. Thinking about what matters to you in a “mission” context may help you identify your big goals—the long term targets that are compelling to you in some way.

Once your goals begin to take shape your ability to manage your time and attention can take shape as well. Clarity in your longer-term goals may also facilitate your ability to negotiate support, and identify metrics that matter to you *and* to your department or college.

*Use the worksheet questions as a guides to draft a personal mission statement. See resources section: Stephen Covey for more information on how to develop a personal mission statement.*



## What is your personal mission?

What is your personal mission statement as an educator, clinician and scholar in your discipline?

What foci at the Health Sciences Center connect most closely to your personal mission?

What foci in your Department connect most closely to your personal mission? How does this align with your College mission?

For your academic success, who needs to be aware of these potential connections? What short and long-term results or outcomes may develop from your invested time and talents?

## What are your goals?

What are your specific goals?

Are the objectives for each goal measurable in quantitative and qualitative terms? Are they **SMART** (e.g., Specific, Measureable, Achievable, Relevant and Timely)?

What products or outcomes will result when you achieve your goals? What will be improved as a result? What current or important problems will be resolved or mediated by the steps you take and work you complete?

*See Goals and SMART Objectives worksheets in Appendix C.*

## Worksheet **d**

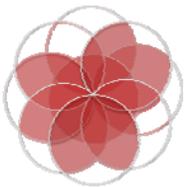
# Have You Named Your Benchmarks?

Your personal mission statement as an educator, clinician and scholar has implications for the skills, behaviors and knowledge you will continue to develop in your academic career.

If you included personal goals within your personal mission statement attaining these will similarly require your attention to specific items, such as maintaining your personal well being, building and sustaining your personal relationships, and attending to your emotional, physical, spiritual and community life.

With regard to your work related and academic career “mission” consider noting what types of engagement activities will confirm for you that you are on path with regard to the mission you have set out to embrace. Similarly consider the activities that will make you aware you are on track with your personal mission.

Look for points of intersection so you can accomplish synergy between your personal and professional mission when feasible to do so.



## Goals Consult with Your Mentor

Note the current allocation of your academic time by percent of your full-time effort (FTE):

- \_\_\_\_\_ Teaching and Learner Development
- \_\_\_\_\_ Scholarship, Research and Creative Achievement
- \_\_\_\_\_ Patient Care and Clinical Leadership
- \_\_\_\_\_ University Service
- \_\_\_\_\_ Leadership, Administration or Other Service
- \_\_\_\_\_ Other (specify the area)

What is your long-term goal for each of the above noted areas? What is your goal for the current year?

- At minimum write out your goal for teaching, research and scholarship to share as a draft with your mentor.
- What results do you expect to achieve during the year ahead?
- What data sources will you use to benchmark your results as compared to others at your rank and status?

*Discuss your goals and your time allocation to each area with your mentor. Request feedback about how well these goals and intended results align with departmental, university or disciplinary standards for productivity. Discuss the metrics that are used to determine the relative value and significance of results in each area for a faculty member at your career stage.*

*What attributes are you looking for in a mentor for this next stage of your career (e.g., through your next academic advancement)? What attributes do you have that a potential new mentor might appreciate or find valuable should they elect to invest time and their counsel with you?*

## **Ten Tips for Getting Started in Your Academic Health Center Faculty Career!**

1. Within 4-months of your appointment to the faculty position review expectations with your supervisor. Be sure your expectations and those of your supervisor regarding expected results or how they will be achieved are reasonably aligned.
2. Develop both annual goals and career goals related to each relevant mission (teaching, research, and service).
3. Identify appropriate metrics and benchmarks for each OUHSC mission.
4. Set SMART objectives— specific, measureable, achievement oriented, relevant and time-specific.
5. Create a development plan with your supervisor. Lifelong learning is a necessity.
6. Identify a mentor and/or coach – \*convene your career advisory board.\* A career advisory board should include people you trust who can inspire, make you perspire, encourage you to aspire to great things and help you celebrate when you achieve a goal.
7. Prepare an annual report or brief memo summarizing your work; share with your supervisor before each annual review.
8. Meet with your supervisor for *feedforward*, feedback and annual review. Give them your written goals and brief annual report.
9. Request written feedback on your work products and progress from peers and senior colleagues.
10. Request a mid-course peer review of your progress (after 24 months on the job) and note major areas to sustain, jettison and/or improve. Acknowledge changes in expectations by you and/or your supervisor. Assess and act on the feedback you get.

Please regard these ten tips as an invitation to partner with your department chair, dean and our office on development of your academic career. Let us know your thoughts and questions!

*Adapted from Source: Williams, VN. 2011  
OUHSC Academic Career Boot Camp*

A red square graphic with the word "Step" in yellow and the number "3" in white.

## Curriculum Vitae and Annual Report

An academic institution may adopt or use a standardized curriculum vitae, particularly in the academic advancement process. If such a document is available in electronic or print form a copy should be appended to the IFcDP as a guide for structuring and updating the faculty vitae. If there is no standardized vitae, the CV guide which follows includes headings and information typically included in the health professions and biomedical sciences faculty CV.

In addition to the CV, a brief biographical sketch describing the individual's development and/or contributions in specific areas can be written and appended to the IFcDP. As a brief narrative record the biosketch has some standard uses for granting agencies and as preliminary or introductory information in various nomination processes. It can also provide the department chair with rapid access to up-to-date summary information about a faculty member's specific skills.

Both the CV and the biosketch may include accomplishment highlights in specific mission areas, such as research achievements, teaching products developed, specialized clinical or scientific expertise. The degree of detail will vary with the biosketch typically offering a deeper description yet narrower focus.

Keeping the CV and biosketch updated permits the faculty member, department chair or mentor to rapidly share introductory or detailed information about the faculty member to promote engagement in roles of keen interest. Each of these documents should include an "updated" date notation to facilitate quick and accurate dissemination.



# Step 3a

## CV Guide Instructions

Review the CV GUIDE which follows with a copy of your current CV in hand. Note any items not addressed in your CV. Think specifically about the work you have completed during the past year that had tangible results. Are those items identified in your CV based on the product itself (such as a course syllabus update or a clinical protocol being used) or based on the role you had in producing the result (such as completed term of service as a member of the institutional IRB)?

Use the major headings at minimum. Please use those subheadings that are relevant for your professional career progression to date and the academic career pathway you have selected.

Additional subheading or items to be included may come to mind. Before listing anything under “Other” determine if the item would fit best under the research/scholarship, teaching, or service subheadings. These core roles and responsibilities are typically included in the career development and academic advancement review. The significance of items noted under “other” may be missed.

Seek out advice from faculty who have previously updated and circulated their own CV’s for peer –feedback. Consult your mentor, supervisor or department chair if you have questions about how specific accomplishments and activities are typically represented in your field.

*Avoid fluff but be complete.*

Questions or feedback about using the CV GUIDE in the IFcDP to prepare your curriculum vitae for academic advancement review should be directed to Dr. Valerie N. Williams, Vice Provost for Academic Affairs & Faculty Development or your Department Chair/designee.



# Curriculum Vitae Guide

## **Complete name**

with degrees and University office(s) contact information.

No heading. Following your name include your office contact information immediately below. List department name, office address, room number, city and state. Telephone and fax number, and faculty member's e-mail address.

## **EDUCATION and TRAINING**

List the education and formal training you have received, in chronological sequence by inclusive dates, most recently completed listed first and concluding with college degree. Include degree earned, institution, and state. Training would include fellowship/postgraduate or postdoctoral programs.

## **PROFESSIONAL EXPERIENCE**

**Academic: Administrative:**

**Hospital/Agency:**

**Other Organizations  
(public/private):**

List positions held by the job title. Begin with the most recent or current position. If any position was less than full time indicate the percent of your commitment. Include roles and position titles for the subheadings noted. For each listed position, in addition to the title note the inclusive dates, institution/organization, and state/location.

This section is for the chronological listing of jobs held and not committee roles. Those will be addressed under the Service heading.

## **U.S. MILITARY EXPERIENCE**

If relevant include your rank, status, and length of military service. Skip this heading if not-applicable.

## **CERTIFICATION or BOARD STATUS**

Date achieved and type. Skip this heading if not relevant to your discipline.

## **LICENSES**

List date issued, state, and current status as active or inactive. Do not include any license numbers; DEA numbers. Skip this heading if not-applicable.

## **SCHOLARSHIP**

### **Research Funding:**

- Current
- Pending
- Completed

List grants and contracts. Include current, pending, and past/completed funding. For each listing the following should be clearly noted:

- Project title, your role (such as principal investigator, site PI, investigator, etc.), and percent effort.
- Funding agency/organization and grant number.
- Direct cost amount supported.
- Inclusive dates/project duration.

If students, residents, fellows, post-docs, or junior faculty were mentored as part of funded research indicate by a notation.

Section heading—continued [optional]

**Teaching Materials Developed**

List in date order by most recent. Include the title, type of material developed. Note if materials were peer reviewed; indicate date and review source.

**Scholarly Activities and Creative Achievements**

List training grants, contracts, entrepreneurial activities, patents, and other achievements that give rise to intellectual property. For each listing the following should be clearly noted:

- Project title, your role (specify principal investigator, project director, evaluator, project faculty, or indicate other title).
- Your percent effort.
- Funding agency/organization and contract/award number.
- Project budget or direct cost amount supported.
- Inclusive dates / project duration.

If students, residents, fellows, post-docs, or junior faculty were mentored as part of the funded training grant or contract indicate by a notation

**PUBLICATIONS**

*Items in press or accepted for publication are included here in the CV. Items submitted or under review are not included here. Place such items in your annual report until in press.*

Include only items published, in press or accepted. Provide an accurate citation. Highlight your name among listed authors by italics, bold or underlining. Campus Tenure Committee requests publications consecutively numbered beginning with most recent as #1 to #X oldest.

If you served as the mentor for a student or junior colleague and are in the last author position indicate with an asterisk (\*) at your name and a notation immediately under the publications heading as follows:

\*Indicates mentor

**Peer Reviewed or refereed**

Include here original works, review articles or similar items which have been subject to peer review and subsequently published in scientific and scholarly journals that have editorial boards and a system of critical review for all submissions for publication in hard copy or electronic form. List as would be cited in a reference. Include link to e-journals.

**Non-refereed and other publications**

Original works appearing in non-refereed publications refer to those which do not routinely use a system of critical review before publication. For example articles solicited by the journal publisher are often non-refereed and may be published in hard copy or electronic form. List as would be cited for a reference.

Section heading—continued [optional]

**Book Chapters**

List as would be cited in a reference.

**Books**

List as would be cited in a reference highlighting your role as an author or editor.

**Non-authored publications**

A specialized category typically relevant for clinician scientists or clinicians involved in large multi-site clinical trials. Include this as a sub-heading if you were formally acknowledged in a publication for contributions.

**Review Articles**

Typical examples are non-peer reviewed articles such as published scientific reviews for mass distribution.

**Abstracts**

- Posters
- Published
- Oral Presentations

List as would be cited in a reference. Note where presented including sponsoring organization, location and date. If the abstract was published so indicate. If not published indicate if the abstract was presented by a poster or by oral presentation.

**Commentary**

Examples include editorials, position papers, background papers.

**PRESENTATIONS**

- Local
- Regional
- National
- International

Include original invited lectures and oral presentations noted as they would be cited if referenced. For each presentation indicate title, sponsoring organization, location where presented, and date. If the presentation was subsequently published by a sponsoring organization for hard-copy or electronic distribution so note. *Indicate clearly if invited lecture.*

These presentations are typically to include those delivered to audiences that are not your regular students or departmental colleagues.

**TEACHING**

**Course participation**

- Department
- College
- Campus
- Other

Include at least the past six years of teaching. If teaching occurred at other than OUHSC, indicate the institution and location. Include specifics wherever possible such as inclusive dates, course number or seminar/ teaching session title. Specify students instructed (such as medical students by year; allied health, pharmacy, dentistry, nursing, public health, graduate, and so forth). Include contact/ classroom hours or credit hours when applicable and your role such as instructor/co-instructor, course coordinator, etc. If role has been continuous note starting date to present and frequency of offering.

If teaching is typically not in a classroom note any formal presentations given. Separately note and specify the mentored setting for teaching such as surgery, patient rounds, or laboratory.

**Mentoring and Advising**

List students mentored for thesis or dissertation work and include your trainees for at least the 6-years past. Note the period of training and any awards or support provided.

Section heading—continued [optional]

*Mentoring and Advising—  
continued*

Indicate service on student committees or as chair for master's or doctoral candidates thesis and/or dissertation committees. Include student mentoring/advising. *Note student's degree completion dates.*

Separately list, by name, early career faculty or novice peers you have mentored with inclusive dates.

### **Career Advising**

List departmental or college assigned career advising activities with which you have been involved for medical students, graduate medical education (GME) trainees, graduate students, or postdoctoral students/fellows. Include descriptions of the career advising activities, years in which activities occurred, and numbers of students and/or GME trainees involved.

### **Contributions to Continuing Education**

List continuing education offerings given by you for discipline or interdisciplinary audiences and include title, date, location.

List sabbaticals you sponsored.

### **PROFESSIONAL SERVICE**

- Department
- College
- Campus and University

**Clinical/Patient Care** provided by a physician or other clinician faculty member. If clinical services are provided indicate type of practice, estimate of time commitment to these duties and quantify or note volume of patient referrals or relevant process or outcome indicators. Provide inclusive dates for listed items.

**Clinical Leadership** provided in faculty role can be noted and may include your involvement in service planning, coordinating, delegated supervision, or systematic facilitation/guidance of clinic team or health professionals, support staff and/or personnel tasks focused on patient satisfaction/health care service delivery improvement. Provide inclusive dates for listed items. *If you are an acknowledged procedural expert (specify how acknowledged, such as via accredited CE offerings) and/or have a documented national or international reputation in an area of clinical expertise, so indicate and cite source.*

**Committee Service** (non-education focused) listings should include the committee title and service dates. If you held a leadership position so note.

**Educational Leadership and Administration** listings would include roles held for educational planning, coordinating courses or seminars, providing supervision and direction of undergraduates, interns, residents, graduate and postdoctoral students, fellows, or for interdisciplinary teaching. Provide inclusive dates for each listing.

### **Local/Regional Service**

Service provided outside of the University of Oklahoma to professional organizations and relevant community organizations. Include dates and list offices held or leadership roles, consulting provided/ term of service. Examples include serving as an editor, grant reviewer or in other capacities for a local or regional organization.

Faculty Member Name, Department, College—page # FOOTER

Section heading—continued [optional]

**Editor, Editorial Board, Journal Reviewer**

Note journals and dates, number of reviews completed can be listed in parenthesis. Include if ad hoc reviewer with date of first service for each listed item.

**National/International Service**

This notation is for roles other than as a reviewer. Note involvement in professional organizations and societies. Include offices held or leadership roles, consulting provided. Include dates or term of service as relevant for each listed item. Examples include: *servicing on study sections or as a reviewer for granting agencies, leadership roles in national/international organizations.*

**Service to other organizations**

Include service provided at academic institutions other than the University of Oklahoma with inclusive dates of service.

**Community Service**

Include service to lay and other relevant community organizations; list inclusive dates of service and any leadership roles.

**HONORS and AWARDS**

Include awards, honors, special recognition received. Include the award title/type and date. A very brief explanation of the award significance may be included if not clear from award title, such as in awards named after individuals significant within a field but potentially unknown beyond those peers.

**MEMBERSHIPS**

Professional and scientific memberships should be listed with inclusive dates. Items listed here are those where you are a dues paying/member in good standing. *Memberships with leadership roles list under service.*

**PROFESSIONAL GROWTH AND DEVELOPMENT**

**Continuing education completed** should list short courses, conferences, or similar events attended. Include those particularly relevant to improving your knowledge/skills in education, research or service. If the list is extensive include especially those items most recent and/or relevant to your teaching, research and/or service roles.

**Sabbaticals or formal course work in progress.** Include dates and hosting organization. If the course of study resulted in nationally recognized/formal certification or a degree do not list here; include under education and training.

**OTHER**

Other offers a category for listing items that do not appropriately fit any of the preceding headings. Any items listed should be relevant to academic career advancement or your professional expertise. Provide dates for each listed item.

**Last Updated Date**

*Note when CV was last updated. This is helpful if there is a need to submit a new CV during the advancement process due to a significant achievement added while review is on-going. Notation ensures a common reference so that the correct copy of the CV is provided to reviewers.*

***END NOTES for your CV  
preparation***

**Format**

If your department or college has specific instructions about the format for your CV for academic advancement, follow those instructions.

In general, include a FOOTER (preferred) or HEADER with your name, department, and the page number on every page.

Use a simple FONT typeface with print size 10 to 12.

**Assistance**

Questions about preparing the CV for academic advancement can be directed to your Department Chair, the Dean's Office of your college or the OUHSC Office of the Vice Provost for Academic Affairs & Faculty Development.



A red square graphic with the word "Step" in yellow and "3b" in white.

## The Annual Report

A written annual report is required by some colleges at the OU Health Sciences Center and is optional for others. If you have the option of developing an annual report, should you make the effort?

The benefits of a written year-end summary are two-fold.

First, your summary can provide your supervisor with a clearly articulate listing of your accomplishments in advance of your annual review meeting. In this case it can serve to highlight the work behind milestone achievements that are noted in your curriculum vitae or it can be an indicator of progress toward agreed upon goals or objectives that have not yet reached the deliverables stage.

Second, an annual report provides a segment of the narrative description about progress of your work an arc of time. This written summation can be useful to your preparation for promotion or tenure review.

Annual reports can take many forms, from a brief memorandum to a full scale portfolio update. A written annual summary should at minimum address your contributions to the University mission (teaching, research and service) and offer some indication of agreed upon goals or objectives that have been achieved with any resulting products or outcomes noted.

A sample annual report guide follows.

*Note: The curriculum vitae guide and the Annual Report guide are available as separate documents for download.*

# Annual report guide

**Section Headings for your annual report—note dates inclusive from year X to X1**

**Teaching goal:**

What significant outcome are you working toward?

**Teaching Activities**

Estimated % effort committed to this area\_\_\_\_

- Include courses, lectures and types of students taught (e.g., discipline, year in and program of study; include interdisciplinary/interprofessional teaching)
- Identify innovations and products of teaching
- Identify participation in peer-review of teaching and summarize results

**Research, scholarship and creative achievement goal and focus:**

What significant gap in the literature (field) does your research and scholarship address? Provide context.

**Research Activities**

Estimated % effort committed to this area\_\_\_\_

- List grants submitted and note status (funded, under review, *approved but* not-funded) and your role
- List contracts funded; patents or other creative achievements
- List publications in refereed and non-refereed journals resulting from your work
- List publications and abstracts including items under review and manuscripts submitted but not yet accepted or in print

**Service Activities**

Estimated % effort committed to this area\_\_\_\_

- Clinical
- Non-Clinical

- Describe contributions and/or oversight of clinical areas and/or significant teamwork or leadership contributions to non-clinical areas.
- Describe service to department, college, university and national or international service. Note by title and organization any leadership roles

**Continuing Education Activities**

- College contributions you made to CE for others. Continuing education for you to advance your knowledge and skills (formal and informal).
- Other

**Next Year's Goals**

Specify goals for the year ahead. Note anticipated or agreed to changes in your percent of effort committed to each area.

## Step 4

# Feed-forward and Feedback: the Critical Partnership with Peers, Mentors, Coaches and Advisors

**F**eedback is a recognized tool of engagement between peers and between seasoned and novice individuals working toward achievement of mutually desired ends. The feedback process includes some basic tenets, that when upheld, can help the person receiving the feedback and the person delivering it. Most feedback is after the fact. Before it is delivered, it can be useful if there is another type of conversation that we will call *feedforward*.

Do you need a Mentor, a Coach, or a **Career Advisory Board**?

It is possible that at different stages of your academic career you will want one or more of these individuals as part of your professional team.

Build and cultivate your network of trustworthy colleagues. Pay forward the investment that others have made in you.

*Feedforward* is the conversation or process where expectations are made explicit, mutual goal setting is initiated, and the specifics and timelines for anticipated achievements, products and performance are described. *Feedforward* can be especially useful as part of a periodic academic career planning conversation because the time horizon for academic promotion and/or tenure is typically longer than any single year of annual performance. *Feedforward* clarifies assumptions that may or may not be commonly held but that can be critically important to the performance of tasks and activities and assessment of their relative importance in achieving short- and longer-term goals and objectives.

Supervisors are usually well-positioned to offer both *feedforward* and feedback. They are typically senior peers or persons with delegated authority and responsibility for an academic program, department or center. However, some unique attributes of the Academic Health Center environment may benefit when people other than, and in addition to the supervisor, serve as key informants in the *feedforward* and feedback process for a faculty member. This key informant role may be fulfilled by peers, mentors, coaches and advisors. Brief definitions are:

- **Peer:** an individual of similar or close rank and stature who is in a position to both observe and understand the typical or day-to-day responsibilities of a colleague.
- **Mentor:** an individual senior to the colleague who may provide the

junior colleague with hands-on experience and invited opportunities for professional development and growth. Typically someone in the same discipline who may also serve as a direct role model for what senior colleagues in the field are expected to do. The Mentor-Protégé relationship is a developmental one expected to transition to a peer relationship as the novice gains experience and independent stature.

- **Coach:** In the AHC arena a coach can be a peer or a non-peer who has specific expertise and or guidance to offer the individual faculty member. Generally a coach is involved for a limited period of time while the faculty member is working to develop or refine a specific bit of knowledge or skill.
- **Advisor:** In Academic Health Centers advisors can come in many forms and their relationships with the individual faculty member can include a range of roles. Advice offered may touch on the full continuum from personal to professional matters. These relationships may be formal or informal.

While these relationships are not mutually exclusive, each one has its own traditions and its own potential usefulness based on the faculty member's specific interests and goals. Consider the way these relationships are initiated, reciprocated and expected to typically evolve to determine which ones may best serve your needs.

Creating a personal **Career Advisory Board** that taps into the perspectives, experiences and insight of colleagues who have fulfilled one or more of the roles mentioned can provide a faculty member with a vital professional resource network.

## The Career Advisory Board

A career advisory board can be formal or informal but the role it fulfills takes the career trajectory for academic faculty into consideration. During the early years of an academic career the members may serve as experienced advisors who understand how to navigate various faculty responsibilities, or who can explain and offer examples of important benchmark and productivity measures relevant to the mission. At the early career midpoint, prior to academic advancement eligibility the Career Advisory Board may offer context rich feedback or serve as a sounding board. During the academic advancement process members of this group may be appropriate and agree to be nominated to provide written letters of evaluation or recommendation.

Creation of a Career Advisory Board is a step the faculty member can take to complement or supplement the formal *feedforward* and feedback process within the department. Faculty need not have a reporting relationship to any member of their advisory board

The key roles we believe a career advisory board can fulfill follow the acronym **AsPIRe**:

- **Aspiration.** Member encourages faculty member to consider taking on responsibilities that are stepping stone skills for roles that may currently be out of reach
- **Perspiration.** Member pushes faculty member beyond what appears possible on the surface. Encourages investment of sweat equity to achieve a bigger outcome on key projects
- **Inspiration.** Member is a role model and exemplar to the faculty member; embraces curiosity and interest; shares insights
- **Recreation** (and Celebration!). Member encourages faculty to pause and acknowledge achievements; stay mindful and engaged in life activities that contribute to wellness, resilience and stress reduction. Encourages and participates in celebration with the faculty member in recognition of achieved milestones.



## Who are the Candidates for Your Career Advisory Board?

A career advisory board should include people you trust who can inspire, make you perspire, encourage you to aspire to great things and help you celebrate when you achieve a goal.

- To encourage me to **aspire** to roles and responsibilities or team and leadership opportunities that may currently be out of reach, but not forever.
- To make me **perspire** means pushing me beyond what I might think is possible.
- To **inspire** me by role modeling or engaging things that interest me and embracing my curiosity.
- Recreation** and celebration with me and for me. Encouraging me to acknowledge those milestones that are important and not let me ignore the little things and big things that matter.

*List the people you consider candidates for these individual roles on your career advisory board. Consider inviting them, one at a time, for coffee. Ask if willing, over the year ahead, to touch base with you periodically about professional interests, or serving as a sounding board. If the person agrees decide together how often you'll touch base— just to get into a regular practice of communicating.*

*It is okay for one person to fill more than one role, but certainly not all the roles. Diversity of your board is best for securing rich perspective.*

*Be prepared to make a personal assessment based on the principles of having an group of **AsPIRe** advisors. Be sure to say “thank you” along the way.*

Candidates for my ASPIRE career advisory board and their contact information (or who might introduce me?):

# Step 5

## Preparing Your Faculty Portfolio

A portfolio is a tool for selecting, assembling and displaying the meaningful roles, responsibilities, products and artifacts of faculty work. It can serve as the initial repository for items that may contribute to the faculty member's academic advancement dossier. A portfolio can be a hard copy, electronic or combination document.

For an quick overview see the following links:



- [Creating a Teaching Portfolio](#) (PDF)  
Located at: [www.ouhsc.edu/facdev/documents/Portfolio\\_Teaching\\_AAP\\_2012\\_lf.pdf](http://www.ouhsc.edu/facdev/documents/Portfolio_Teaching_AAP_2012_lf.pdf)



- [Creating a Service Portfolio](#) (PDF)  
Located at: [www.ouhsc.edu/facdev/documents/Portfolio\\_Service\\_AAP\\_2012vw\\_000.pdf](http://www.ouhsc.edu/facdev/documents/Portfolio_Service_AAP_2012vw_000.pdf)



- [Creating a Research and Scholarship Portfolio](#) (PDF)  
Located at: [www.ouhsc.edu/facdev/documents/Portfolio\\_Research\\_AAP\\_2012\\_vwlf\\_000.pdf](http://www.ouhsc.edu/facdev/documents/Portfolio_Research_AAP_2012_vwlf_000.pdf)

# endnote

A comprehensive portfolio can also serve as the source document for selection of specific results and annotating a summative chronology of faculty work. Such a document can complement the complete curriculum vitae and serve as the written narrative that is submitted with the promotion and/or tenure dossier for academic advancement.

Specific advancement criteria should be addressed, as specified by the academic department, college and the OU Health Sciences Center, to ensure that the narrative addresses items that will be considered relevant at each step of the review process.

Questions related to assembling the dossier for review can be directed to your department chair or designated mentor, the Office of the Dean for your college, or to the Office of the Senior Vice President and Provost for the OU Health Sciences Center.

Questions about any item in this IFcDP overview can be directed to the Vice Provost for Academic Affairs and Faculty Development or emailed to: [facdev@ouhsc.edu](mailto:facdev@ouhsc.edu) or call 405-271-5557.



## Resources

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# appendix

## Appendix **a**

Individual Faculty Career Development Plan (IFcDP) **Checklist** for Mentor Meetings during First 24-Months of plan implementation

1. Preparation ahead
2. Agenda for 1-1 meeting with FLP Director
3. Agenda for meeting with Department Chair (or designated mentor/sponsor)
  - Goal setting & feedforward
  - Annual feedback

## Appendix **b**

Agenda/Discussion Worksheets

1. Initial IFcDP meeting
2. Career Plan Review or Annual Review meeting

## Appendix **c**

Goal and SMART Objectives Worksheets

1. Teaching and Learner Assessment
2. Scholarship and Research
3. Patient Care and Service

Individual Faculty Career Development Plan (IFcDP) Checklist  
for Mentor Meetings during First 24-months of plan implementation

appendix a

# 1. PREPARATION AHEAD

Complete pre-assessment worksheets on:

- (Teamwork and) Leadership (service) self-assessment
- Goal Setting and Time Management
- Communication and Negotiation Skills
- Teaching and learner assessment
- Research and scholarship assessment
- Service and community-of-practice assessment
- Leadership Practices Inventory (Initial assessment – FLP and Mid-Career Only)

Review and annotate introduction to IFcDP with DRAFT responses

Step 1: "What Matters to You?" and "How are You Allocating Your Time?"

Step 2: Goals, Objectives, Activities and Results. Consultation with Your Mentor/Coach

- DRAFT your personal mission statement. Be prepared to discuss how your personal mission aligns with the HSC mission and department mission.
- How does your expected time allocation (Step 1) align with expected results (Step 2) with regard to your goals and expectations (yours and institutional)?

Step 3a: UPDATE and FORWARD a copy of your updated "Curriculum Vitae" to your mentor (or FLP Director) for review

Step 3b: OUTLINE your "Annual Report" for the current academic year and be prepared to discuss milestones with your mentor (or FLP Director)

Step 4: PREPARE for Feed-forward and feedback

Step 5: PREPARE Your Faculty Portfolio documentation. Select the DRAFT suited to your specific academic career pathway. Discuss how used with you mentor/coach

- DRAFT in-progress Educator's Portfolio (optional)
- DRAFT in-progress Clinician-Educator's Portfolio (optional)
- DRAFT in-progress Clinician-Scientist Portfolio (optional)
- DRAFT academic advancement mid-point review NARRATIVE (36-mo ahead of adv. candidacy)

12 mo. prior to advancement candidacy

- DRAFT academic advancement NARRATIVE – Promotion only
- DRAFT academic advancement NARRATIVE – Promotion and Tenure
- DRAFT academic advancement NARRATIVE—Tenure only (current Associate Professor or Professor only)

**Individual Faculty Career Development Plan (IFcDP) Checklist**  
for Mentor Meetings during First 24-months of plan implementation

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## 2. AGENDA for 1-1 MEETING WITH FLP DIRECTOR (or VP Academic Affairs & Faculty Development)

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GOALS.

Review DRAFT goals and proposed objectives and metrics/measures. Prioritize objectives to match desired outcomes for the year (target measures for 9-10-months from start date to match annual faculty feedback and evaluation cycle)

TIME MANAGEMENT (TM).

Ref Worksheet      “What Matters to You?” and “How are you allocating your time?”

Review personal and professional time allocation in light of specified goals, objectives and associated tasks to confirm feasibility or modify. Review long-term aspects of goals to determine if time reallocation needs to be negotiated during the current year. (Complete update in preparation for FLP or faculty development session on time management).

1. Flag items for attention to achieve personal and professional goals
2. Note professional time current and desired percent FTE by mission

INDIVIDUAL CAREER DEVELOPMENT PLAN DISCUSSION and DOCUMENTATION.

Discuss pre-assessment results and desired state re:

- Goals, goal setting and time management
- (Teamwork and) Leadership (service) benchmarks
- Communication and Negotiation Skills
- Teaching benchmarks
- Research and scholarship benchmarks
  - Discuss Scholarship-in-Progress proposed project topic and research plan
- Service and community-of-practice assessment

PREPARE ACTION PLAN.

Discuss how to use goals specified in FLP application or initial mission specific career goals and the IFcDP as foundation to write “BHAG” (“Big Hairy Audacious Goals”) based on your Personal Mission Statement. BHAG goals, unlike annual targeted goals, are meant to be 3-5 year duration statements for each mission. Such goals may be stated as a hypothesis or research question, or posed as an answer to a question about improving a mission specific present condition. Use ACTION PLAN worksheet templates in the IFcDP guide.

- Select and note **focal agenda items** for 30-minute meeting with Sponsor/Department Chair. If additional time is needed confirm availability in advance of the meeting
- Set tentative date for completion of *feed-forward* meeting with Chair and submission of follow-up final goals to FLP Director (**no later than 2/15/13**)

**Individual Faculty Career Development Plan (IFcDP) Checklist**  
for Mentor Meetings during First 24-months of plan implementation

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### **3. AGENDA for 1-1 MEETING WITH DEPARTMENT CHAIR** (or designated MENTOR/SPONSOR)

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#### **GOAL SETTING & FEEDFORWARD - 30 minute meeting**

##### **BEFORE THE MEETING**

Send any needed documentation to the Chair at least 48 hours in advance of the meeting. Bring a copy. Aim for 2-4 pages maximum length, not including updated CV

##### **DURING THE MEETING**

1. Review DRAFT goals, proposed objectives and metrics/measures.
2. Prioritize objectives to match desired outcomes for the year (target measures for 9-10-months from start date to match annual faculty feedback and evaluation cycle)
3. Discuss pending changes in the department that may affect progress toward goals
4. Discuss department priorities, confirm general goal alignment and /or modifications needed

##### **AFTER THE MEETING**

Confirm, via brief memorandum or e-mail, that proposed goals, objectives and benchmarks are aligned with selected academic career pathway and expectations for promotion and/or tenure.

#### **ANNUAL FEEDBACK - 30 minute meeting**

##### **BEFORE THE MEETING**

Send ANNUAL REPORT memo or any required form to the Chair at least 48 hours in advance of the meeting. Bring a copy. Aim for 2-3 pages maximum length, not including updated CV

##### **DURING THE MEETING**

1. Review results associated with annual goals, objectives and proposed metrics/measures.
2. Identify comparators—your results as compared to peers at your rank
3. Discuss any goal requiring modification due to circumstances beyond your control\*
4. Confirm continuity or changes to department priorities that may affect goal alignment

*\* Be specific about the situation and guidance or help needed to address barriers.*

##### **AFTER THE MEETING**

- Confirm, via brief memorandum or e-mail, that action items to be addressed will be reported on by [when – specify date]
- Confirm that any new goals, objectives and benchmarks are aligned with selected academic career pathway and expectations for on-time promotion and/or tenure

**appendix b –1**

**AGENDA—IFcDP Initial One-on-One Meeting**  
 [Name, degree, current rank], Department, College, Sponsor

Faculty Appointment Date: Month \_\_\_ Day \_\_, Year \_\_\_  
*Promotion Eligible* \_\_\_ *Cycle*

**Writing Goals:**

[See Jim Collins "How to Tell if You Have a Good BHAG" \[Big Hairy Audacious Goal\]](#)

**1. Review Initial Goals**  
*(see FLP application):*

**Teaching**  
 Current % Effort: \_\_\_\_\_

Desired % Effort: \_\_\_\_\_

**Research/Scholarship**  
 Current % Effort: \_\_\_\_\_

Desired % Effort: \_\_\_\_\_

**Service/Patient Care**  
 Current % Effort: \_\_\_\_\_

Desired % Effort: \_\_\_\_\_

**2. Curriculum Vitae Review:**

- Faculty CV feedback attached
- 1. Review demographic section
- 2. Review mission sections
- 3. Date CV last updated: \_\_\_\_\_

**3. Scholarship-in-Progress (SiP) Project Proposed Topic and Research Plan:**

Proposed SiP project title: \_\_\_\_\_

- Focus:  Educational Scholarship    Clinical Research    Laboratory Research  
 Public Health Research    Other

OUHSC required training for research completed? Yes   No. If not, see schedule and select training date

SiP Project IRB/IACUC/IBC Review Status: \_\_\_\_\_

FLP Peer Mentor Proposed: \_\_\_\_\_

**AGENDA—IFcDP Initial One-on-One Meeting**

Faculty name, degree, department, college  
Meeting day, date, time, location

**4. Department and College Alignment Objectives**

A. Self-Assessment Review

	<u>Poor</u>	<u>Below Avg</u>	<u>Avg</u>	<u>Above Avg</u>	<u>Excellent</u>
	1	2	3	4	5
Goal Setting/Time Mgt					
Leadership (Service)					
Communication & Negotiation					
Teaching & Learner Assessment					
Research/Scholarship					
Service & Community of Practice					

B. Follow-up and/or support needed (what are your priorities for dialogue with your sponsor?)

C. **Feedforward** completed by when: \_\_\_\_\_

**Agenda Attachments:**

- Self Assessments
- Curriculum Vitae
- Scholarly Project Approval Form

**appendix b - 2**

**Agenda—IFcDP Spring Career Plan Review and Annual Review Prep**  
 \_\_\_\_\_, Assistant Professor, DEPARTMENT, COLLEGE  
 Sponsor: \_\_\_\_\_

Faculty Appointment Date: Month \_\_\_\_\_ Day \_\_\_\_\_, Appt. Year \_\_\_\_\_  
*Promotion Eligible \_\_\_\_\_ Cycle*

Meeting Date: \_\_\_\_\_, Time \_\_\_\_\_, Library 164, OKC

**Goals:**

**1. Review Updated IFcDP**

**Goals:**

**Teaching**

Current % Effort: \_\_\_\_\_

Desired % Effort: \_\_\_\_\_

**Research/Scholarship**

Current % Effort: \_\_\_\_\_

Desired % Effort: \_\_\_\_\_

**Service/Patient Care**

Current % Effort: \_\_\_\_\_

Desired % Effort: \_\_\_\_\_

**2. Developmental objectives reviewed by Department/ College?**

A. What are you negotiating?

B. Observations & self-assessment re progress toward these goals to date?

C. Follow-up and/or support still needed:

D. **Feedforward** completed by: \_\_\_\_\_

**AGENDA—IFcDP Spring Follow-up**

\_\_\_\_\_, Assistant Professor, DEPARTMENT, COLLEGE

Meeting Date: \_\_\_\_\_, Time \_\_\_\_\_, Library 164, OKC

**3. Scholarship-in-Progress (SiP) Project Topic and Research Plan Update:**

Scholarship in Progress (SiP) Project Title: \_\_\_\_\_  
 \_\_\_\_\_

SiP Project Collaborators/pending authors): \_\_\_\_\_  
 \_\_\_\_\_

SiP Project Focus:      Educational Scholarship    Clinical Research  
                                    Laboratory Research    Public Health Research  
                                    Other

IRB/IACUC/IBC Review Status: \_\_\_\_\_

IRB/required training completed?    Yes    No. If NO, include date training is scheduled to be completed? \_\_\_\_\_

FLP Peer Mentor : \_\_\_\_\_

Number of FLP peer-mentor meetings completed as of this date? \_\_\_\_\_

Dept. Mentor (if other than Dept Chair/Direct Supervisor): \_\_\_\_\_

**4. Updated Curriculum Vitae Review:**

Citations for curriculum vitae as you progress through and complete FLP:

1. **Honors, Awards:** Selected for OUHSC Faculty Leadership Program Faculty Fellow & Class of [Year]
2. **Presentations:** [Name, project title,] OUHSC Faculty Leadership Program Presentation of Scholarship-in-Progress (SiP), [Month Day,] 2013
3. **Presentations:** OUHSC Faculty Leadership Program Scholarship-in-Progress (SiP) Poster Presentation (Month/Day/Year)

Pending your follow-up when SiP research is completed:

1. **Presentations:** [Regional or national presentation of your SiP research]
2. **Publications:** [Publication of your SiP research]

**Agenda Attachments:**

- IFcDP Checklist
- Updated Goals
- Scholarly Project Approval Form
- SiP Project Research Plan Update completed
- Updated Curriculum Vitae

## appendix c

**INDIVIDUAL FACULTY CAREER DEVELOPMENT PLAN (IFCDP)****GOALS AND SMART OBJECTIVES WORKSHEETS:**

FOR EARLY CAREER TO FIRST TRANSITION FACULTY

**Worksheet Instructions:**

The following descriptions are provided to help guide you in using the Individual Faculty Career Development Plan (IFcDP) Outline.

- **Goal(s) and/or Responsibility(s):** Specify a long-term (3-5 year) goal. Consider duties delegated to you. What contributions you are making within the division or section, department, college and university. What you are working to achieve in each mission area that will contribute to improvement(s) in teaching or learning, discovery, application, innovation or technology use/transfer, or integration of knowledge from one arena to another. Strive for one "BHAG"\* per mission area. Two at maximum.
- **Specific Goal-Related Objective(s):** What work will be done to accomplish the goal or responsibility? (i.e., relative to your percent of FTE dedicated in that area) Write objectives related to each goal.
- **Measure(s) (Quantitative & Qualitative):** What measures provide program metrics or benchmarks for each goal or responsibility?
- **Achievement Expected & Output(s)/Product(s):** What other products or outcomes are expected from your invested time on each objective?
- **Indicators of "Excellence" - Data Source(s) (External) /Comparative Standard Source(s) (Internal):** What external and internal standards can be used to judge the accomplishment of objectives and/or progress toward the goal?

**Review & Approval:** Discussed and agreed/or modified date

- Faculty Leadership Program Director
- Department Chair or other sponsor/mentor
- Final Approval

Name: \_\_\_\_\_

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

**GOAL(S): TEACHING**

*To achieve this (these) goal(s), determine the following (be SMART!):*

**Specific Goal-Related Objectives:** *What work will be done to accomplish the goal or responsibility? (i.e. Relative to FTE)*

**Measures (Quantitative & Qualitative):** *What measures are available for each goal or responsibility?*

**Achievement Expected & Outputs/Products:** *What other products or outcomes are expected from your invested time?*

**Relevant Indicators of "Excellence"/Data Sources (External)/Comparative Standard Sources (Internal):** *What standards can be used to judge the accomplishments?*

**Time Bound:** *By what date will you accomplish the objective?*

**Chair Agrees?** *Date of agreement*

Name: \_\_\_\_\_

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

**GOAL(S): [TEACHING]  
LEARNER ASSESSMENT**

*To achieve this (these) goal(s),  
determine the following (be  
SMART!):*

**Specific Goal-Related Objectives:** *What work will be done to accomplish the goal or responsibility? (i.e. Relative to FTE)*

**Measures (Quantitative & Qualitative):** *What measures are available for each goal or responsibility?*

**Achievement Expected & Outputs/Products:** *What other products or outcomes are expected from your invested time?*

**Relevant Indicators of "Excellence"/Data Sources (External)/Comparative Standard Sources (Internal):** *What standards can be used to judge the accomplishments?*

**Time Bound:** *By what date will you accomplish the objective?*

**Chair Agrees?** *Date of agreement*

Name: \_\_\_\_\_

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

**GOAL(S): SCHOLARSHIP**

*To achieve this (these) goal(s), determine the following (be SMART!):*

**Specific Goal-Related Objectives:** *What work will be done to accomplish the goal or responsibility? (i.e. Relative to FTE)*

**Measures (Quantitative & Qualitative):** *What measures are available for each goal or responsibility?*

**Achievement Expected & Outputs/Products:** *What other products or outcomes are expected from your invested time?*

**Relevant Indicators of "Excellence"/Data Sources (External)/Comparative Standard Sources (Internal):** *What standards can be used to judge the accomplishments?*

**Time Bound:** *By what date will you accomplish the objective?*

**Chair Agrees?** *Date of agreement*

Name: \_\_\_\_\_

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

**GOAL(S): RESEARCH**

*To achieve this (these) goal(s), determine the following (be SMART!):*

**Specific Goal-Related Objectives:** *What work will be done to accomplish the goal or responsibility? (i.e. Relative to FTE)*

**Measures (Quantitative & Qualitative):** *What measures are available for each goal or responsibility?*

**Achievement Expected & Outputs/Products:** *What other products or outcomes are expected from your invested time?*

**Relevant Indicators of "Excellence"/Data Sources (External)/Comparative Standard Sources (Internal):** *What standards can be used to judge the accomplishments?*

**Time Bound:** *By what date will you accomplish the objective?*

**Chair Agrees?** *Date of agreement*

Name: \_\_\_\_\_

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

**GOAL(S): PATIENT CARE**

*To achieve this (these) goal(s), determine the following (be SMART!):*

**Specific Goal-Related Objectives:** *What work will be done to accomplish the goal or responsibility? (i.e. Relative to FTE)*

**Measures (Quantitative & Qualitative):** *What measures are available for each goal or responsibility?*

**Achievement Expected & Outputs/Products:** *What other products or outcomes are expected from your invested time?*

**Relevant Indicators of "Excellence"/Data Sources (External)/Comparative Standard Sources (Internal):** *What standards can be used to judge the accomplishments?*

**Time Bound:** *By what date will you accomplish the objective?*

**Chair Agrees?** *Date of agreement*

Name: \_\_\_\_\_

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

**GOAL(S): SERVICE** (Non-clinical/ other contributions and leadership)

*To achieve this (these) goal(s), determine the following (be SMART!):*

**Specific Goal-Related Objectives:** *What work will be done to accomplish the goal or responsibility? (i.e. Relative to FTE)*

**Measures (Quantitative & Qualitative):** *What measures are available for each goal or responsibility?*

**Achievement Expected & Outputs/Products:** *What other products or outcomes are expected from your invested time?*

**Relevant Indicators of "Excellence"/Data Sources (External)/Comparative Standard Sources (Internal):** *What standards can be used to judge the accomplishments?*

**Time Bound:** *By what date will you accomplish the objective?*

**Chair Agrees?** *Date of agreement*