Postdoc and Advisor Action Plan   **21 May 2025**

Goal: Provide strategic direction while bringing structure and clarity to the postdoc and their advisor for specific tasks, goals and objectives.

Background: APO envisions this as being used to help advisors and postdocs work through specific action items when more accountability- from both the postdoc and advisor- is needed. Section 3 provides specific examples across various timelines, e.g. a very specific task that should only take a month or two up to a year-long research project and manuscript. This is not meant to define the entirety of a postdoc and advisor relationship, but provide help for specific activities, projects, and goals when such accountability is needed.

1. Identify Goals and Objectives

It is essential to acknowledge that every postdoc and advisor relationship is distinct, and a standardized approach may not yield optimal outcomes. Remember you are both working toward a mutual goal – the postdoc's success. The advisors of postdocs have the responsibility to provide a postdoctoral experience that is fundamentally educational in nature and advances the postdoc's career. However, postdocs bear the primary responsibility for the success of their experience, with the support of their advisors, mentors and mentoring committees, and the institution.

The action plans described below focus on very specific objectives and should cater to the postdocs needs, whether completing a project, advancing in their current position, switching to a new role, or acquiring specialized technical expertise. A vital aspect of the action plan is the clear definition of postdoc and advisor roles with target due dates and resources needed (including other individuals) to increase accountability on both sides. This should also help both parties decide on the frequency and mode of communication and focus on specific items of interest.

2. Establish a Starting Point

The assumption ahead of this action plan is that both the postdoc and advisor already have outlined expectations about the performance of the postdoc, including the overall research plan and the postdoc's responsibility for ongoing research. It also assumes the postdoc and advisor agree about these expectations and plans. There are several other resources we are developing in APO to help with this, including advisor training, a postdoc IDP, an alignment checklist, and other guidance documents. Here, we are focusing on crafting specific goals for an action plan. Ensure the aims and objectives of the postdoc and advisor align. Advisors should generously share their experiences and insights to aid in the formation of realistic and feasible goals, with the knowledge that a mid-course correction might be needed.

3. Develop a Customized Action Plan Template

After setting the objectives and determining the starting point, it is crucial to formulate a tailored action plan template. The template should include the following:

1. Clear and specific goals/objectives/tasks

2. Well-defined timeline for achievement, acknowledging life (and research) are not linear

3. A comprehensive list of necessary resources and support

4. An effective method for tracking progress and evaluating success

5. Regular check-ins and feedback sessions to drive continuous improvement and make adjustments as required

e.g., prompt. Please list two or three goals/tasks. Include action steps to complete your goals and who will own the steps and time frame for each goal to be completed.

Example for Goal X:

- **Goal Title:** [e.g., "Complete Experiment Y or Model Run Z"]

- **Description:** [Brief description of the tasks to achieve goal]

- **Resources Required**: [List of resources needed, e.g., "Lab Supplies, $$$, CPU"]

- **Target Due Date:** [Due date for task completion]

- **Status**: [Not Started / In Progress / Completed]

This could also be put in a table format, such as:

Goal with Description: Complete computational analysis of a monster dataset and determine 3 main results of monster dataset

Action Step/Resources Needed	By	Status	Date
Write new code for taking dataset X to output Y: Need access to server for 2 wks	Postdoc, HPC	Started	5/15/25
Share code and initial output with advisor	Postdoc	Not Started	6/1/25
Provide written or verbal feedback to postdoc	Advisor	Not Started	6/1/25
Make 2-4 figures to describe output in detail	Postdoc	Not Started	7/1/25
Provide written or verbal feedback to postdoc	Advisor	Not Started	7/15/25
Write a page or so about big outcomes of this analysis	Postdoc	Not Started	8/1/25
Provide written or verbal feedback on written outcomes	Advisor	Not Started	8/15/25
Decide what next	Postdoc and Advisor	Not Started	9/1/25

Goal with Description: Submit for publication a manuscript of a postdoc's super exciting result from analyzing the monster dataset

Action Step/Resources Needed	By	Status	Date
Create a list of data collection and analysis milestones with predicted dates of completion	Postdoc	Started	5/15/25
Meet to discuss this list and revise based on advisor feedback to finalize milestones list	Postdoc and Advisor	Not Started	6/1/25
Complete analyses and milestones lists	Postdoc	Not Started	7/15/25
Meet to discuss outcomes of milestones and decide on target journal	Postdoc and Advisor	Not Started	8/15/25
Create schematic outline of major sections, subject headings, subheadings	Postdoc	Not Started	9/15/25
Meet to discuss paper outline and revise accordingly	Postdoc and Advisor	Not Started	10/15/25
Create main figures	Postdoc	Not Started	11/15/25
Meet to discuss main figures and provide feedback	Postdoc and Advisor	Not Started	12/15/25
Create a schedule of writing sessions to work on specific aspects of the manuscript	Postdoc and Advisor	Not Started	1/15/26
Many more things to go here….	Co-Authors		

Example: Create a resume. Postdoc is going on job market soon, needs a resume for industry-specific jobs, rather than a CV for academic positions.

Action Step/Resources Needed	By	Status	Date
Find resources online and through contacts for taking an academic CV to an industry resume; include APO office and alumni contacts	Postdoc and Advisor, Mentoring Committee	Started	5/15/25
Email first draft to advisor	Postdoc	Not Started	6/1/25
Review/Provide feedback	Advisor	Not Started	6/15/25
Meeting to finalize draft	Postdoc and Advisor	Not Started	7/1/25
Share with alumni in industry, other experts, for additional feedback, then finalize	Postdoc and Advisor	Not Started	7/15/25

4. Implement the Plan and Track Progress

Once the action plan has been customized, the next stage is the execution phase. It is essential to use efficient communication strategies, establish periodic progress check-ins, and make necessary adjustments to the plan to work toward successful outcomes.

Monitoring progress and measuring success are vital aspects of every action plan. By closely tracking progress, both the postdoc and advisor can ensure that the action plan remains aligned with the postdoc's development and contributes effectively to their growth. To facilitate this process, there are several essential elements to consider:

- **Setting Milestones and Checkpoints:** Advisors and postdocs should establish clear milestones and checkpoints to track progress. Milestones mark significant achievements, while checkpoints enable regular assessments and adjustments.

- **Utilizing Tools for Tracking Action Plans**: Incorporating the right tools can greatly enhance the effectiveness of monitoring action plans. If the table format from above is used, for example, a shared excel sheet or google sheet can be used to track progress. This provides a centralized platform for documenting goals, recording accomplishments, and receiving feedback.

5. Evaluate Desired Outcomes

When creating an action plan, evaluating the intended results is crucial. This should focus on the postdoc acquiring skills, completing a project, fostering professional growth, and aligning career goals through regular discussions.

What should either party do if the progress or outcome does not meet the goal/timelines set by action plan? Talking open and honestly about roadblocks is important, as often what is standing in the way is clear to one individual, and not the other. Please also see the "Mentor Best Practices – Communication" document from UIC, as there is excellent advice in how to give constructive and effective feedback, how to actively listen, as well as how to identify barriers to effective communication. Both postdocs and advisors should read this. Some highlights include:

- Providing and receiving feedback can be a very positive experience for the advisor and the postdoc if you both understand that you share the same commitment to developing the postdoc's career. When someone is up against a deadline and feel they haven't gotten far enough along, this can be hard, so remember that commitment.

- When either of you give feedback, it is important to acknowledge accomplishments and successes along with the areas in which improvement is needed.

- You should both always be specific in providing feedback and keep it simple. It is not terribly helpful to say, "Your work is sloppy" or "I don't understand." It is much more useful to describe the specific element of work that concerns you. Sometimes writing this down first can be easier before communicating it verbally.

- If either the postdoc or advisor is falling behind in meeting deadlines, don't automatically assume a lack of commitment. Explore what is really going on and bring in others to help if needed.

- Specific to advisors: When providing feedback, offer to work with your postdoc to develop solutions to any problems that they are encountering. Too often, advisors send postdocs off to solve problems alone without the right tools, but working together, whether screensharing code or writing in a shared document simultaneously, can produce better outcomes, faster. Again, remember that the advisors of postdocs have the responsibility to provide a postdoctoral experience that is fundamentally educational in nature.

- If one or both of you feel you have come to a point where you cannot make progress on an action plan, reach out for support, either through the Education/Postdoc Coordinator in your department, a trusted colleague or mentor, or the Assistant Dean of Postdocs in APO. They can help you determine if more mediation will be helpful.

By implementing a well-defined action plan, you can track progress, evaluate success, and maintain accountability, while contributing to individual postdoc career development and overall growth. A successful action plan is pivotal for fostering career development and achieving desired outcomes, creating a mutually beneficial relationship between advisors and postdocs.