

## SEFS Postdoc IDPs and Written Annual Reviews

Please see below for some documentation requirements related to updates to the union contract for Postdoctoral Scholars, specifically Article 11 about Individual Development Plans (IDPs) and Annual Progress Assessments.

### **Individual Development Plans**

Article 11 of the [postdoc union contract](#) addresses Individual Development Plans and Progress Assessments. An individual development plan (IDP) identifies the Postdoctoral Scholar's general research goals, professional development objectives and career objectives. It may also serve as a link to the Supervisor's research goals and thus may serve as a communication tool between a Postdoctoral Scholar and their Supervisor.

**Supervisors will review the postdoc's IDP to ensure the IDP is clear about research goals, general professional development needs and career objectives, taking into account funding source requirements and limitations, as well as effort reporting.**

**Supervisors will provide advice about possible revisions as needed.** In the absence of an IDP, within a reasonable time after the beginning of each appointment, the Supervisor, or in limited circumstances their appropriate designee, shall communicate the expectations they have for the Postdoctoral Scholar's research and career progress.

SEFS expects all faculty supervising postdoctoral scholars to create an IDP with their postdoc(s) within a month of their hire date. These will be collected annually for their files to ensure the contract is being followed. For all faculty who hire a new postdoc, please send in their initial IDP to [sefshr@uw.edu](mailto:sefshr@uw.edu) **within one month of their hire date**. When reappointing a postdoc, please review their existing IDP and send any updates to [sefshr@uw.edu](mailto:sefshr@uw.edu) **within a month of reappointment**.

We don't have an exact *template* for postdoc IDPs, but the Graduate School has some guidance, including a downloadable worksheet, that can apply to both grad students and postdocs. That guidance is located here: <https://grad.uw.edu/current-students/student-success/planning-your-path/>. Alternate resources are located here: <https://depts.washington.edu/mbtguw/resources/idp/> and here: <https://postdocs.stanford.edu/current-postdocs/navigating-your-individual-development-plan-idp/your-individual-development-plan>. You can choose the format that seems like the best fit.

Additional guidance can be found in **Section 11.2. Individual Development Plans and Performance Expectations** of the [postdoc union contract](#), which advises that a

discussion of the IDP takes place, the postdoc then conducts a self-assessment and submits a written draft to the supervisor for discussion, then the supervisor reviews the IDP and provides advice about possible revisions as needed, with the process repeating until a final document is agreed upon.

### **Progress Assessments**

The postdoc contract also requires periodic and annual progress assessments. A Progress Assessment is an evaluation of the Postdoctoral Scholar's progress and accomplishments in research and professional development.

**Periodic Reviews** – The Supervisor and the Postdoctoral Scholar shall periodically engage in informal oral Progress Assessments during their appointment. In these assessments, the Supervisor and the Postdoctoral Scholar generally discuss the Postdoctoral Scholar's recent research progress and overall research objectives. The structure of the Progress Assessment may vary by discipline.

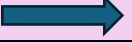
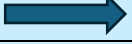
**Annual Review** – The Supervisor shall provide the Postdoctoral Scholar with at least one written review per twelve (12)-month period. This Annual Review is a comprehensive assessment of the Postdoctoral Scholar's research progress and professional development during the previous year. The Supervisor may utilize an independently developed or a pre-established form when conducting the Annual Review.

SEFS will begin collecting these required annual written review documents 6.5 months into each appointment of 7-12 months in duration, including reappointment years. For all faculty who hire (or reappoint) a postdoc, please send in their annual review to [sefshr@uw.edu](mailto:sefshr@uw.edu) **within 6.5 months of their hire (or reappointment) date**. You may use the [Performance Evaluation – Conversation Approach – Professional Staff \(PDF\)](#) form for those annual reviews or create your own thorough review document if that is a better fit.

After hiring or reappointing a postdoc, you can refer to the **Postdoctoral Scholar files due to HR tracker** chart included on the page below to remind you when to submit these materials. Start dates can be found under the employee's profile in Workday. Check under the **Academic** category to specifically see the postdoc academic appointment if they have had previous UW employment.

Questions can be directed to [sefshr@uw.edu](mailto:sefshr@uw.edu).

## Postdoctoral Scholar files due to HR tracker

Postdoc hired (or reappointed) in this pay period	Postdoc IDP* due (in one month)	Postdoc annual review due (in 6.5 months)
January 1-15 	February 1-15 	July 16-31
January 16-31	February 16-28	August 1-15
February 1-15	March 1-15	August 16-31
February 16-28	March 16-31	September 1-15
March 1-15	April 1-15	September 16-30
March 16-31	April 16-30	October 1-15
April 1-15	May 1-15	October 16-31
April 16-30	May 16-30	November 1-15
May 1-15	June 1-15	November 16-30
May 16-30	June 16-30	December 1-15
June 1-15	July 1-15	December 16-31
June 16-30	July 16-31	January 1-15
July 1-15	August 1-15	January 16-31
July 16-31	August 16-31	February 1-15
August 1-15	September 1-15	February 16-28
August 16-31	September 16-30	March 1-15
September 1-15	October 1-15	March 16-31
September 16-30	October 16-31	April 1-15
October 1-15	November 1-15	April 16-30
October 16-31	November 16-30	May 1-15
November 1-15	December 1-15	May 16-30
November 16-30	December 16-31	June 1-15
December 1-15	January 1-15	June 16-30
December 16-31	January 16-31	July 1-15

**\*Individual Development Plan**

Please send documents to [sefshr@uw.edu](mailto:sefshr@uw.edu)