

# Yearly Planning Meeting

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A meeting to discuss where we were and to plan where we are going next.

## Goals

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1. Celebrate accomplishments
2. Set short-term and long-term research and career goals
3. Help make rapid progress by prioritizing projects and identifying barriers
4. Clarify and solidify relationships by giving honest constructive criticism
5. Clarify expectations in both directions and address any disagreements

As you progress through your current position here, these yearly meetings will provide you and me with multiple opportunities to develop and execute a plan that can ensure that you attain a satisfying career. And, since you need different things at different times, these meetings will give you and me a chance to take a birds-eye-view of your accomplishments and goals, which I can use to tailor my advice to be most helpful in your particular circumstances.

## Basic Process

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- We will organize this meeting around a Planning Document containing two very simple worksheets: Goals and Planning Worksheet and Calendar.
  - You can download a blank document [here](#) and an example (filled) document [here](#).
  - Remember: filling-in these worksheets is not the point; they are the means to organize a fruitful conversation by allowing everyone to gather thoughts beforehand, remember what to say during the meeting, and have a record of what was discussed.
- The meeting itself lasts for about an hour.
- Before the meeting, both you and I will fill in the Goals and Planning Worksheet (Page 1). More about this [below](#).
- During the meeting, we will go through this worksheet together and jointly fill in the Calendar (Page 2). The goal is to come up with a rough and flexible road map for the year that both of us agree on, along with reasonable time estimates.
- At the end of the meeting, you and I will have two amended copies of the Goals and Planning Worksheet and one filled-out version of the Calendar. All completed worksheets are given to you at the end to copy or scan and return right away. Everything is then totally transparent (no edits done in private). Both you and I keep the full set of completed worksheets.

## Before The Meeting

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- Think carefully about your future and not just your next analysis.
- These meetings are an opportunity to articulate your long-term goals and then make a plan to attain them, in terms of both your research and developing necessary skills.
- It can be helpful to seek feedback from other people in the lab about your strengths and areas that you could improve upon, and to brainstorm about specific steps to take to realize your goals.
- The more specific your plan before the meeting, the more productive the meeting will be.
- You may not have yet decided on your long-term career goals. That's perfectly OK. In that case, the goal of the meeting can be to explore different options in a concrete way: which online tools to use for exploring careers, how to identify others mentors in the field, which career seminars to attend, etc., can all be good places to start.

## Things I Will Do Before The Meeting

- Think about my own goals for you, as well as your goals for yourself.
- Think about your personal and professional circumstances and how I can help in your progress and motivation to reach your goals.
- Depending on your stage and needs, a number of specific things will go on in my mind as I prepare for this meeting including:
  - Any additional expertise you might need - new skills, courses, etc.
  - Finding a collaborator or other resources to fill any gaps

- Reasons to persist on specific challenges or to move on
- Finding all the information you need to decide on a career direction
- Qualifications you need to succeed in your chosen career

## Goals and Planning Worksheet

Be brief. This is a bullet point list to guide your conversation and serve as a reminder later.

### Accomplishments

- I know that you are terrible perfectionists and never give yourselves enough credit for the things you've achieved. Be broad and generous in what you consider an accomplishment.
- Don't just include things that would go on a CV, such as publishing papers or giving talks at a conferences. Include:
  - Progress toward goals (e.g., drafting or submitting a paper, getting a tough analysis/approach to work)
  - Important exams (e.g., qualifying exams, GREs)
  - Applications (e.g., for fellowships, conferences, graduate school, or jobs)
  - Development of transferrable skills (e.g., learning a new technique, organizing a workshop, reviewing a paper or grant), and
  - Milestones (e.g., choosing a postdoc lab, having a thesis committee meeting, organizing an internship).
- Remember that science happens in the context of someone's whole life — you can acknowledge things outside the lab that impact work (e.g., family commitments, moving from a foreign country and getting settled, choosing a thesis lab).

### Research Goals

- Focus on major milestones for getting projects accomplished – on a 1–3 month timescale – rather than nitty gritty weekly or daily goals.
- Precise timing isn't so important, since we all know how unpredictable research can be. The point is to prioritize research goals and make an initial estimate for how long they will take so that obstacles can be clearly identified through the year.
- For this to work, your estimates have to be realistic, both in terms of how long things take and how many things you can accomplish during the year. If there too many goals or the estimates are unrealistic, the plan will become a recipe for disappointment. Also, consider the goals from the year before and whether they've been accomplished. If yes, fantastic! They should be listed in the accomplishments section. If not, why not? Should those goals be restated for the upcoming year, or should the project change direction or be jettisoned?

### Professional/Personal Goals

- This section is for articulating:
  - i. Your long-term career goal, and
  - ii. Which professional skills you'd like to develop and targets you would like to hit to attain that goal.
- Some examples include: completing specific projects, submitting papers, attending a conference, networking with people outside academia, improving communication skills, applications for specific fellowships/grants, or plans for committee meetings/qualifying-exams/graduation. Even if your career goal is still unclear, you can still use this section to think about how to build on current strengths and improve on weaknesses.

### Feedback

- This is the place for constructive criticism about how goals are being met, both at the level of the individual and at the level of the lab. Make sure you articulate things you think are going well and specific issues that could be improved.
- Think about how the lab and your interactions with me are working for you. For example:
  - Are you meeting too little or too much with me?
  - Are you worried about the trajectory of your project or someone else's in the lab or in the field?
  - Do you have the balance of projects and free time that you're looking for?
  - Are there general issues in the lab that you would like to let me know, even if they don't pertain to you in particular? [Remember, you're not tattling. You're pointing out conflicts so that they can be resolved, and I would most appreciate that.]

## Giving and Receiving Critical Feedback

We will strive to observe these [guidelines](#) while we record and discuss feedback we have for each other.

## The Meeting

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### Take the Lead

- The floor will be yours to take the lead in the discussion as you go over your worksheet.
- Although I might chime-in with minor comments, my primary role will be to first just listen & ask questions if necessary.
- When you're done, I will do through that section from my worksheet. I may add any additional comments, or summarize the discussion.
- We will proceed this way section-by-section.

### Working from Printed Copies of the Worksheet

- Let us bring printed copies of our worksheets for the meeting. No iPad or laptop screen. Having a good interaction is more important than taking tidy notes.
- Printed copies can and should be annotated by both you and me during the meeting and will show everything that we recorded individually.

### Give Me Your Honest Feedback

- I know that it's hard to tell people negative things! It's a real emotional risk — it would be much easier to just say everything is fine. However, I like to see critical feedback as an opportunity to improve towards common goals. So, do let me know what you honestly think.
- While I give you feedback, remember that you don't have to immediately agree with or incorporate everything (anything) that's said. My hope is for both you and I to take our time to earnestly consider the feedback we get and proceed from there.

## Reference

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[Yearly Planning Meetings: Individualized Development Plans Aren't Just More Paperwork](#). DePace & colleagues.

| [arjun@msu.edu](mailto:arjun@msu.edu) | [@compbiologist](#) | [thekrishnanlab.org](http://thekrishnanlab.org)