

Creating a Personal Strategic Plan

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Karen Nordell Pearson
Associate Dean for Research and Scholarship
Associate Professor of Chemistry
Hope College
nordellpearson@hope.edu



360° Review: A pre-planning exercise

360° Review

Many organizations and businesses use a process called 360 performance reviews to evaluate the strengths, weaknesses and effectiveness of their employees. The general idea of the 360 review is that by soliciting feedback from many sources about the employee, a more complete assessment can be obtained than if just one boss or supervisor was in charge of the performance review. 360 reviews have been used in a wide range of other situations including student learning assessments, building design projects and program reviews.

With that in mind, conduct a smaller scale 360 review of yourself. The review will involve *at least two, hopefully three components*, your self-assessment, a conversation with a colleague who knows you in a professional or academic context and a conversation with someone who knows you in a more personal context. Each of these three components should not take more than an hour of your time.

Questions you may ask those you interview:

- What are my strengths? What are my advantages? Which of my qualities are most likely to contribute to my career success?
- What are my weaknesses? Which of my qualities might limit my career success if I ignore them? What can I improve? What should I avoid?
- What are some of my strongest or weakest professional and interpersonal skills?
- In what type of environment do I do my best work?
- How do I best contribute to work within a group?
- What is my leadership style? (i.e. behind the scenes, out in front)
- When have I taken a significant risk and what was the outcome? What was my last failure? What did I learn from that experience?

Questions to ask yourself:

- What do I consider my vocation? How does it fit with St. Olaf's mission?
- What do I want my resumé to look like in three years?
- Of the things you've done in your life so far, of which are you most proud?
- How do my strengths fit with my goals for the future?

The two or three people I'll ask to help with my review:

Three most valuable insights from my review:

1.

2.

3.

Laying the Groundwork for Success - Creating a Personal Strategic Plan

Am I a planner by nature? Why or why not?

What's the value of planning for me?

Why is now a good time for me to try?

"I have used my SAP. I pinned it up above my desk as a reminder of the goals I'd set. It was more a visual cue than an actual checklist - I think the act of writing it was more important than treating it as law. I felt the SAP was the most valuable part of the workshop. It's something that I would never have done on my own."

- Mari Lee, Colorado College (NFW 2012 participant)

"Buy into the idea of a strategic action plan. It may sound like an abstract exercise, but I've found mine keeps me on track for the big picture things (grant writing, next year's scholarship, staying on top of new science). These longer term objectives are the first to fall by the wayside in the face of the daily cycle of lecture prep, lecture, grade, committee meeting, repeat. And the SAP is a valuable tool to make sure you come up for air!"

- Doug Martin, Lawrence University (NFW participant 2009)

"I found my SAP extremely helpful and have used it as it was formulated during the meeting."

- Lee Bishop, Beloit College, (NFW 2012 participant)

"Like so many things in life, your career is something that deserves thoughtful, creative and strategic planning and such planning will help you achieve the outcomes you desire."

- Karen Nordell Pearson, CUR Quarterly Article, Spring 2008

Exploring Vocation

One needs more than ambition and talent to make a success of anything, really. There must be love and a vocation. - Jessye Norman

A society in which vocation and job are separated for most people gradually creates an economy that is often devoid of spirit, one that frequently fills our pocketbooks at the cost of emptying our souls.

- Sam Keen

Sometimes you have to do the work and hope the career materializes. - Michael Lipsey

What does vocation mean to me?

Questions:

What is a Personal Strategic Plan?

There are five major components to a personal strategic plan.

Stage 1: Vision

Start by creating a vision statement for your career. A vision statement is almost always future-looking, envisioning a future of flourishing in your vocation.

Stage 2: Goals

Napoleon Hill said "A goal is a dream with a deadline." Given that most careers have multiple stages and multiple areas of involvement, you may want to divide your goals into these categories. You may also want to craft your goals according to several time frames; the next year, the next 1-2 or 3-6 years. Your goals may relate to making yourself an attractive candidate for a particular job, gaining teaching experience, making significant contributions to your field of research, or using your interests and talents to benefit the campus community. However you craft them, make your goals specific, personal, ambitious and realistic.

Stage 3: Strategies

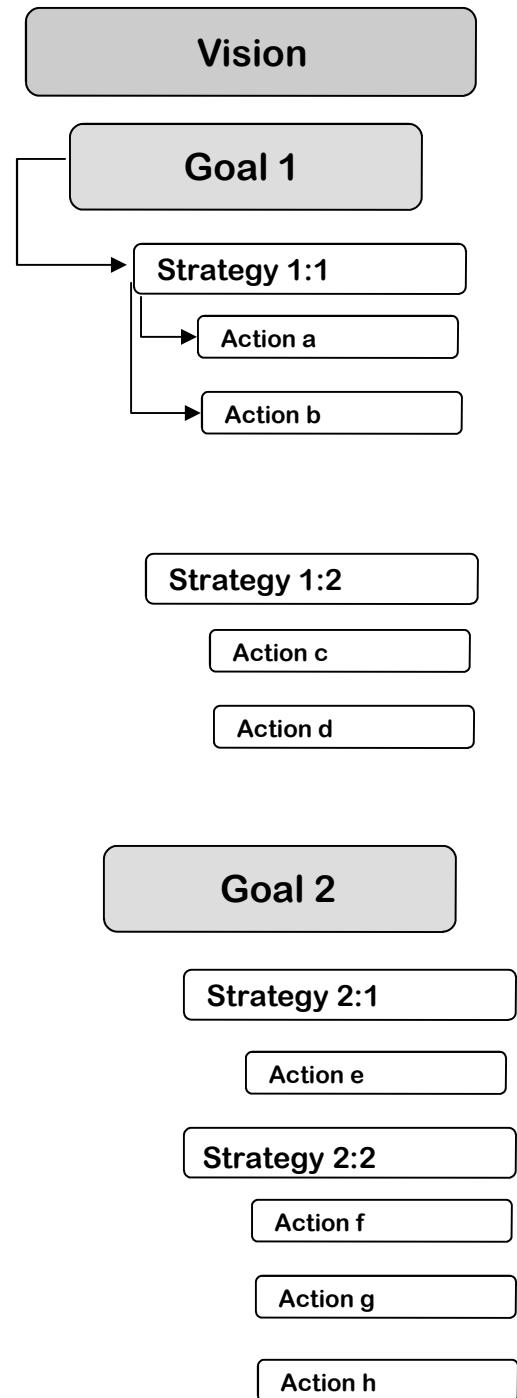
Once you've identified your goals, begin thinking about several strategies that will help you reach them. A strategy is a mechanism for accomplishing your goal. Ask yourself how you're going to get from where you are now to the realization of your goal. Do you need to gather information, get training, secure funding, establish collaborations or seek expertise? Many of your strategies will likely be practical ideas that may be standard and conventional ways to approach your goal. This isn't bad; often 'tried and true' methods work well. But give yourself the freedom to design creative, unconventional or innovative strategies, too. Planning a variety of strategies will likely keep you energized and interested as you work toward your goals.

Step 4: Actions

Finally, once you've identified several strategies for each goal, fill in three or four concrete action items under each strategy. An action is something practical that you're going to do to make progress toward each strategy, such as phone a colleague, attend a workshop, read a manuscript, or learn a new technique. Add a timeframe to each action such as, this week, this month, in the next 3-6 months, within the next year. These timeline reminders will help you stay on course as you use your plan. Again, be ambitious but realistic. Don't set yourself up for failure by expecting that you'll complete all your action items in the first month.

Step 5: Timeline

For each of the actions you generate, identify a realistic timeline by which you'd like to accomplish those actions. They could be very specific times and dates (e.g. once a week, by the end of August), or more general (e.g. by the end of the semester).



Examining a Strategic Action Plan (SAP)

Vision: Contribute to and be appreciated by a thriving liberal arts college community!

Goal #1: Obtain a tenure-track job at a liberal arts college

Strategy	Action	Accomplish by:
Improve application materials	Revise Letter	End of August*
	Revise Research Statement	End of August*
	Revise Teaching Statement	End of August*
	Revise Presentation	October 1st
Make sure recs are up to date	Contact ref for 2nd letter	End of August*

* All these items need to be done a.s.a.p because job ads began appearing in late July.

Goal #2: Develop a long-term, thriving, independent research program that involves undergraduates.

Strategy	Action	Timeline
Explore new project ideas	Explore literature 1 hour per week, take notes, and organize references	Summer & Fall, 2012
Share ideas with peers in the field	Attend regional meeting	September, 2012
Make new contacts	Invite speaker to campus	Fall, 2012
Expand knowledge in new directions	Audit a genetics course	Spring, 2013
Preliminary experiments	Recruit undergrads to join the lab	Fall 2012
	Try a new experiment in an upper level lab course	Spring 2013
Obtain external funding for research	Prepare to submit a proposal in advance of starting the TT job	Spring and Summer 2013

Goal #3: Develop excellent, research-based teaching skills

Strategy	Action	Timeline
Lecture less	Insert <u>one</u> 'new' activity/assessment into every class period	Fall 2012
Visit colleagues classes	Seek out teaching mentors in and out of my department	Fall 2012
Increase knowledge of research-based teaching and learning strategies	Attend a pedagogy meeting	Spring 2013?
	Explore literature 1 hour per week, take notes and organize references	Fall 2012
	Invite a respected scholar of teaching and learning to come present a seminar	Spring 2013

Brainstorming Vision and Goals Individually

Vision:

Goals:

Time for Reflection

Take some time to reflect on your 360 interview, your current situation, where you'd like to be in 2-3 (even 5) years and continue to work on goals and strategies. Eventually, add some specific actions and dates.

Finalizing Your Strategic Action Plan

Working in pairs or clusters

***** Need to create an accountability plan*****

- What am I going to do in the next week?
- What two things am I going to do in the next month?
- Who is going to contact me to ask if I've gotten them done?

What next?

How to use your Personal Strategic Plan

Using Your Personal Strategic Plan (PSP)

- **Share It:** Review your PSP with at least one other person, preferably two or three people including a research mentor, a collaborator, a colleague in your department a family member or a friend. If someone else knows about your PSP and you give them permission to comment on it, chances are much higher that in 6 months or a year from now it will not just have been another good, but now forgotten idea.
- **Post It:** Print or write your PSP on brightly colored paper and pin it to the bulletin board right above your desk or tape it to the wall right inside your office door. You may even be able to fit a copy of your PSP in your daily planner or calendar.
- **Use it with your calendar:** Make use of your PSP in connection with your calendar. While your PSP is fresh, make some notes on your calendar that correspond to action items in your plan. Remind yourself of upcoming deadlines, calls, emails and appointments that you need to schedule to your list each week and carry them over to the next week if you don't get them done.
- **Use it for decision making:** Your PSP can be an excellent tool and reference when making decisions. If you're asked to teach a course, give a seminar, review a manuscript, take on a new research student, or be a co-PI on a proposal, take time to see where this opportunity may fit into your action plan. Evaluate the opportunity realistically in terms of the time it will require and whether the benefits associated with it are worth the costs. Maybe this new opportunity is perfectly timed to help you accomplish part of your PSP and you can eagerly accept. However, that may not be the case. While this new opportunity may be very appealing to you, resist the urge to over-commit yourself if you've already got a full schedule.
- **Review it:** On your calendar, schedule a minimum of 30 minutes each month to revisit your PSP. To make this review more appealing, take yourself out for coffee or lunch with your action plan and your calendar. Spend that time reviewing action items you've accomplished and progress you've made and make notes in your calendar about next steps.
- **Revise it:** Upon reviewing your PSP you may discover that you need to make major or minor revisions. Go ahead, this is a living, changing document that should not constrain you as much as motivate you and help you prepare and realize your goals of success. If you make major revisions, remember to post it, share it, use it and so on.

Karen Nordell Pearson, based on material in a CUR article, Spring 2008

Best idea for me about what to do next with my PSP.

Sample Action Plans

Example 1

Goal 1: To build an active and productive core research program

Strategy	Action	Timeline
Continue to develop postdoctoral research program	<ul style="list-style-type: none">• Finish experiments for current research programs• write papers	Research: Sep 07-Dec 07 Papers: Sep 07-March 08
Explore new, but complementary, lines of research	<ul style="list-style-type: none">• Read the literature• Experimental tests of hypothesis	At least 1 hour each week Sep 07-March 08
Explore the possibility of collaborative ventures with people within and outside department and field	<ul style="list-style-type: none">• Read the literature and note potential collaborators• Attend professional meetings	1 hour per week with follow-up study or email/phone contacts Summer 08 meetings
Secure funding to carry out ideas by applying for grants from foundations and from NIH	<ul style="list-style-type: none">• Meet with mentor or grants officer• Search online for programs and deadlines• Start crafting a proposal	By Oct 07 1st round: Feb 08-June 08 Work at least 1 hour per week on a draft proposal this fall

Example 2

3-5 years Vision: Be an effective teacher and researcher in a tenure-track position at a baccalaureate college or university that includes an undergraduate research component.

2008-2009 Goals:

1) Learn how to get students excited about chemistry through student-centered active learning lectures

Strategies for this goal:

a) Talk with colleagues about our curriculum and modules that are currently in place.

Actions: make an appointment to talk with one person a week for two months

b) Incorporating active learning techniques and classroom assessment techniques into my lecture classes.

Actions: when I'm planning syllabi: work to incorporate one new 'aspect' into each of my courses each week

2) Find a tenure track position

Strategies for this goal:

a) Develop a list of institutions that I want to apply to and contact department chairs about openings.

Actions: each Monday look through the ads in weekly pubs and keep a list of openings
Visit the websites of all the schools with openings

b) Strengthen current research statement

Actions: send research statement to two colleagues for feedback this month

c) Talk with colleagues about their grant writing success including asking for copies of their funded and not funded proposals with reviewer comments.

Actions: invite two colleagues to coffee for these conversations next month

3) Develop a productive and exciting research program that will incorporate undergraduates

Strategies for this goal:

a) Determine which of my 3 research ideas is best to use for the summer of 2008 with two undergraduates

Actions: review needed equipment, supplies, and space considerations with dept chair

b) Survey the literature on the 3 research ideas

Actions: set aside an hour a week for lit review and create a lit binder for each project idea

Beloit * Carthage * Colorado* Grinnell * Gustavus Adolphus * Hope * Knox
Luther * Lawrence University * Macalester * St. Olaf * University of Chicago * Washington University

Midstates Consortium for Math and Science
Connecting campuses to promote excellence in math and science
Established by the Pew Charitable Trusts
www.mathsciconsortium.org

The Midstates Consortium for Math and Science (MCMS) was founded by the Pew Charitable trusts in 1989 to promote collaboration and professional development opportunities for faculty and students at liberal arts colleges and research universities. Since the mid-90's the Consortium has been an independently funded group of just over a dozen schools. Each year we offer faculty and students opportunities including workshops, conferences and funding for collaborations and speaker exchanges. This document summarizes the major programs we support.

Faculty Development Workshops

Faculty development workshops are opportunities for faculty to coordinate and/or participate in meetings with topics ranging from disciplinary curricula and research, uses of technologies and instrumentation, field work, grant writing, and career development. Workshops can be used to connect faculty at consortium campuses to disseminate products or ideas produced with other funding, to share best practices related to pedagogy, curriculum development or undergraduate research programs, or to establish disciplinary or interdisciplinary collaborations.

Most workshops start with a dinner on Friday evening and end Sunday around noon and often occur during the academic year although summer workshops are possible. Workshops are held at any of the consortium campuses and the director's office usually helps coordinate the logistics of travel, lodging, and meals. The workshop's faculty hosts help coordinate the program and invite the speakers or facilitators. The budget per workshop is generally limited to \$15,000.

Each summer the Consortium hosts a *New Faculty Workshop* that includes new hires, faculty who have completed their first or second years of a new appointment (term or tenure track), postdocs and graduate students interested in teaching at a liberal arts college. The *New Faculty Workshop* is usually held in mid-July.

Recent Workshops

- *Interdisciplinary Science Education: Institutional Examples, Lessons Learned and Challenges* (St. Olaf College, Feb '07)
- *Mid-Career Faculty Development Workshop: Re-energize, Re-image and Re-invest in Your Career* (Macalester College, Feb '08)
- *Sharing best practices for serving students and faculty at Science and Math Teaching and Learning Centers* (The Colorado College, April '08)
- *The Impact of Changes in the ACS Guidelines on Chemistry Curricula* (The Colorado College, June '08)
- *Women and the Academy: Defining Our Roles and Shaping Our Communities* (Joint ACM and MCMS at Coe College, September 2009)
- *Moving Campus Sustainability Forward Through Collaborative Projects* (Oct. 2-4, 2009 at St. Olaf College)
- *Midcareer Faculty Development Workshop* (Augustana College, February 18-20, 2011)

Undergraduate Research Symposia

Each fall the two research universities in the Consortium, Washington University and the University of Chicago, host meetings designed for undergraduates to present the results of their own research projects to their peers and some consortium faculty. Washington University and the University of Chicago alternate hosting these meetings for students whose research involves the biological sciences and psychology and students whose work falls under the broader umbrella of physical sciences, mathematics and computer science. Students present in both oral and poster sessions. In the past few years both meetings have attracted more than 100 students and nearly 2 dozen faculty each. Visit the website for pictures and descriptions of past symposia.

- *Biological Sciences and Psychology*, hosted at The University of Chicago, Nov 9-10, 2012
- *Physical Sciences, Mathematics and Computer Science*, at Washington University of St. Louis, Nov. 2-3, 2012

Speaker Exchange Program

The Consortium has an online database of speakers who are willing to visit other consortium campuses to give a colloquium. In addition to giving a seminar, the visitor might consult with the host department about a new course, a curriculum revision, undergraduate research projects, proposal writing, interdisciplinary programs, outreach programs or possible collaborations. The 'consultant' part of the visit is very flexible, but should be considered in addition to the 'speaker' component. Consortium funds are available to pay for travel, lodging, and meals and the online application process is simple.

Recent Visits

- Sarah Boyer, Professor of Biology at Macalester College spoke at Grinnell College "*From New Zealand to the globe: Historical biogeography of mite harvestman arachnids*"
- Bruce Carlson, Professor of Biology at Washington University spoke at Grinnell College "*Sensory Coding and Evolution in Electric Fishes: It's All in the Timing*"
- Tim Pennings and his corgi Elvis, Professor of Mathematics at Hope College spoke at Beloit College "*Do Dogs Know Calculus?*"
- Karen Pearson, Director of the Midstates Consortium for Math & Science at Hope College spoke at Gustavus Adolphus College "*Chemistry's central role in Nanoscience*"

Short Term Consultations

The purpose of the Short Term Consultation (STC) is to encourage and support collaborations involving two or more individuals at different Consortium campuses. Projects might involve sharing information, instrumentation and facilities or expertise among the faculty members of the Consortium. The STC grants fund faculty and students in a particular area to visit a member campus for many reasons including consultation on curriculum, collaboration on research projects, participation as an outside examiner in a senior thesis exam, demonstration of a laboratory technique suitable for an undergraduate laboratory or advising faculty or departments on proposal writing or project assessment. The STC also allows faculty to visit another Consortium institution with highly sophisticated research equipment to have a sample tested, learn a new technique, or visit a field station or library.

The Short Term Consultation Program (STC) will fund travel, hotel, meal and instrument use expenses for no more than three days, and host expenses. Awards for \$1,000 or less will be approved by the Director within one week of receiving the application. The Executive Committee will review proposals for \$1,000 to \$5,000. These funds can be used as matching funds for external grant proposals.

Recent Short Term Consultations

- The weekend of April 16-18, 2010, Mary Crawford from Knox Chemistry and Elaine Marzluff from Grinnell Dan Choffness from the Carthage College Biology department went to Lawrence's Chemistry department where Stefan Debbert and Juan Navea showed him how to use the Gas Chromatography-Mass Spectrometry instrumentation.
- Elaine Marzluff and Mary Crawford requested funding to support a visit of Elaine Marzluff to Knox College to work on preparing an assessment plan for the physical chemistry laboratory. This is part of an ongoing collaboration to develop new laboratory materials in physical chemistry, and will be incorporated into a proposal in preparation for the NSF TUES (Transforming Undergraduate Education in STEM) program. This consultation took place May 13-14, 2011 and was successful.

Elaine M. Marzluff, Mary A. Crawford and Helen Reynolds. "Study of the Kinetics of an SN1 Reaction by Conductance Measurement" accepted for publication in Journal of Chemical Education, May 27, 2011. This publication is the result of a collaboration between Mary Crawford (Knox College) and Elaine Marzluff (Grinnell College) to update and enhance our physical chemistry laboratories. Here we report on the adoption/adaption by Knox of a laboratory using computer data acquisition that Elaine has done at Grinnell College for many years. This collaboration was funded by the Midstates Consortium for Math and Science. Helen Reynolds is a Knox Undergraduate who worked on the adaptation of the lab for use at Knox College.

- January 7, 2011 Paul Overroode, Biology, Macalester College gave a talk and consulted with Kim Dickson from Lawrence University Chemistry department regarding an NIH grant proposal.

Consortium Administration

Brandy Russell, Associate Professor, Department of Chemistry, Gustavus Adolphus College, St. Peter, MN
brussell@gustavus.edu