



Handbook for
Postdoctoral Fellows

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Greetings,

Welcome to the University of Michigan. We hope orientation and the enclosed information ease your transition to working and living in Ann Arbor.

In addition to information about both the University of Michigan and our town, this handbook includes information on housing, campus resources and childcare. Please also review information about the U-M-Postdoctoral Association. You are a new member!

Enjoy your training at the University and living in Ann Arbor. We are happy to welcome you to our community of scholars.

Sincerely,

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Professor of Ophthalmology and Visual Sciences
and Professor of Cell and Developmental Biology
Associate Dean for Academic Programs and Initiatives, Rackham Graduate School

Michele S. Swanson
Professor of Microbiology and Immunology
Director, UMMS Office of Postdoctoral Studies

New Postdoctoral Fellow Arrival Checklist

Welcome to the University of Michigan! As you get settled on campus, please consider the following:

- **Check in with PI.** Meet your colleagues and check out your work area.
- **Check in with Department Administrator for**
 - Employment paperwork (remember to bring identification such as your passport or birth certificate)
 - U-M ID number and unqname (which you need for U-M e-mail)
 - MCard ID application
 - Keycard access forms for your building
 - Ask about other department-specific procedures
- **Go to MCard Office to get your MCard ID.** Locations at Med Inn Building, Central Campus Recreational Building, Student Activities Building, Pierpont Commons and Wolverine Tower.
- **Enroll in U-M benefits.** You have **30 days** from your start date to enroll! Registration is online through Wolverine Access. Refer all questions to the Benefits Office: 734-615-2000
- **Read the relevant portions of the *Standard Practice Guide*** to make certain you understand the U-M policies regarding Postdoctoral Research Fellows. See particularly the Appendix and <http://spg.umich.edu/policy/201.19>
- **Visit Parking and Transportation Services** if you need a parking permit.
- **International Postdocs:** Check in with the International Center immediately for the assistance you will need with
 - Information on Social Security numbers and cards
 - Visa and tax treaty forms
 - Updating benefits/insurance (if required for your visa)

University of Michigan Postdoctoral Association

The University of Michigan Postdoctoral Association (UMPDA) is a volunteer organization whose main objective is to represent the interests and issues of postdoctoral fellows at the University of Michigan. This organization is dedicated to bridging the training gap between the individual's research laboratory and the changing culture of sciences and scholarship.

<http://sitemaker.umich.edu/umpda/home>

The goal of the UMPDA is to augment the professional development provided by faculty mentors and to serve as a forum to identify and address specific needs of all postdoctoral fellows at the University of Michigan.

UMPDA Board

The UMPDA board meets on the second Friday of every month at 9:00 am in 2955 Taubman Health Sciences Library in the Medical School's Graduate and Postdoctoral Studies Lounge.

Everyone is welcome to attend and get involved! Check the website for the most up-to-date meeting information: http://sitemaker.umich.edu/umpda/pda_events

Contact the board via e-mail: umpdaboard@umich.edu

Social Events

The UMPDA hosts a social event every month. This is typically a happy hour or coffee networking event. Keep an eye on the calendar at http://sitemaker.umich.edu/umpda/pda_events, and look for e-mails from the UMPDA for details about these events.

Career Development Calendar

The Office of Postdoctoral Studies and UMPDA schedule a curriculum of career development events each semester. These events are designed to help postdocs identify career paths and gain the skills necessary to succeed in the career of their choosing. Events typically take place on the 3rd Thursday of each month in either the South or West Lecture Hall of Med Sci II unless otherwise noted. For a complete list of this semester's events, visit

<http://www.med.umich.edu/postdoc/current/calendar.html>

If you have suggestions or requests for career development topics or speakers, please e-mail the UMMS Office of Postdoctoral Studies at postdocoffice@umich.edu

Need Help?

Resources are available to help with work-related or personal issues (free and confidential):

U-M Faculty and Staff Assistance Program

<http://www.umich.edu/~fasap>

FASAP is a University of Michigan program that offers a number of services designed to help all staff, faculty, and their immediate family members with personal difficulties encountered at both work and home.

UMMS Employee Assistance Program

http://hr.umich.edu/mhealthy/programs/mental_emotional/eap.html

An additional program for those at the Medical School is the Employee Assistance Program (EAP), a confidential, no cost service for faculty, staff, and their families. Their goal is to inspire ongoing individual and organizational development, while contributing to the health and well-being of the Health System community.

Immigration/VISA Issues

<http://internationalcenter.umich.edu/>

Assistance on immigration issues is available through the International Center located at 603 East Madison, Ann Arbor, MI or call 734-764-9310.

If you need help resolving a dispute

Postdoctoral Ombuds for Dispute Resolution

http://www.rackham.umich.edu/policies/dispute_resolution/

The Postdoctoral Ombuds is a confidential, impartial, informal and independent resource for information or dispute management that serves postdoctoral fellows at the University of Michigan. The Ombuds provides an environment where postdocs can obtain information, review options and resolve problems. The Ombuds is not compelled to report the details of your conversation at any time. Contact Darlene Ray-Johnson: rayj@umich.edu or (734) 936-1647

U-M Academic Human Resources Dispute Resolution Policies

<http://hr.umich.edu/acadhr/researchfellows/dispute.html>

Salary and Benefits

General Guidelines

The most complete listing and detailed description of the salary, benefits, vacation days, sick leave and other compensation available to postdoctoral fellows is located on the website of Academic Human Resources: <http://hr.umich.edu/acadhr/researchfellows/index.html>

Research fellows receive appointments that are of limited duration (i.e., with a specific end date). These appointments are provided to individuals who have received a terminal degree, and who are receiving advanced research training while participating in research or scholarly activities. At the University of Michigan, Postdoctoral Fellows are defined as mentored trainees that are no more than five years beyond the receipt of a terminal degree. Time taken off for other training or employment does not count toward this five-year limit. The duration of your appointment is at the discretion of your department, and is based on your scientific progress and the regulations outlined by your funding sponsor.

Fellowship Classifications and Pay

Scholar Trainee

Individuals are paid a stipend, regardless of the funding source, and effort is solely devoted to research training activity. Such stipends may be charged to institutional or individual training grants, external fellowships or other University funds.

Employee Trainee

Individuals are paid as salaried employees, regardless of the funding source, for providing a service. This generally occurs when the individual's training is accomplished through meeting a work obligation and providing service to a sponsored contract. The appointments of such individuals will show an appropriate percentage of effort and a "salary payment."

Health Insurance

All fellows may enroll themselves and their dependents in one of the following health plans, which will be at the same rates paid by other employees.

Medical Plan Options

- U-M Premier Care
- Health Alliance Plan HMO
- Priority Health HMO
- Blue Cross/Blue Shield PPO
- Comprehensive Major Medical

InformedRX/SXC Prescription Plan

Medications are divided into three tiers with three levels of co-pay.

Delta Dental Plans

There are three different plans available with varied coverage and cost.

Optional Benefits

In addition to the medical, dental and prescription coverage, there are additional optional benefits that are available to postdoctoral fellow for life insurance, legal costs and vision care.

Enrollment for Benefits

*Enrollment in benefits described above **must** be completed within **30 days** of starting your appointment. Benefits selections may only be changed during the annual open enrollment period in the fall, or following changes in family status. You can select your benefits and enroll by simply doing the following:*

1. Review your e-mail notification to enroll.
2. Log on to Wolverine Access: <http://wolverineaccess.umich.edu>
3. Select Employee Self Service, then click on Benefits and then select Benefits Enrollment.
4. Review benefits coverage for you and your dependents (if applicable).
5. Select the options of your choice.

Paid Time Off

Holidays

No minimum appointment is required. All University holidays observed during the appointment period are paid if receiving a salary. *Scholar trainees may have different specifications. Please see your department administrator regarding your specific training grant.

Season Days

Research fellows may be granted time off without loss of their regular compensation on several season days if their department is closed. These season days may include the four working days that fall between the University-observed holidays of Christmas Day and New Year's Day, subject to regulations prescribed by the University.

Sick Time

Up to three weeks/year of paid sick time is provided if you are unable to perform responsibilities due to personal sickness or injury. This includes absences due to pregnancy or a chronic medical illness.

Vacation

One month (22 workdays) is provided per year. Part-time fellows, or those appointed for at least six months but less than a year, shall receive a prorated vacation allowance. Vacation times must be taken during the annual appointment period. No pay in lieu of time off will be provided.

Note: An employee is eligible under the Family Medical Leave Act (FMLA) to be absent from work for up to a total of twelve weeks in the employee's FMLA benefit year for a qualifying event or events with the continuation of benefit coverage when these conditions are met.

<http://hr.umich.edu/tutorials/FMLA/>

Resources

General

The Center for the Education of Women

<http://www.cew.umich.edu>

A wide variety of services including career counseling for the U-M community

The Center for Research on Learning and Teaching

<http://www.crlt.umich.edu>

Conducts seminars, research and programs to enhance classroom practices

The English Language Institute

<https://www.lsa.umich.edu/eli/resources/visitingscholarresources>

The Visiting Scholars Program began in 1996 with courses designed especially to meet the needs of international visiting scholars across disciplines who are engaged in academic research at the University of Michigan.

Faculty and Staff Assistance Program

<http://www.umich.edu/~fasap/>

Professional and personal counseling services for University employees

The International Center

<http://www.internationalcenter.umich.edu>

Resources available for International postdocs

University Libraries

www.lib.umich.edu

Begin at this portal to get oriented to all the of University's libraries and related services.

Computer and Training Information

Computer Showcase

<http://showcase.itcs.umich.edu/>

U-M students, faculty and staff can purchase software, supplies and add-ons at a discount through U-M Computer Showcase, located at the ground floor of the Michigan Union.

Human Resource Development

<http://www.hrd.umich.edu/>

Human Resource Development is the University's commitment to your success. It is the place where you can choose from more than one hundred programs and courses designed to teach you new skills to help advance your career.

Information Technology Central Services

www.itcs.umich.edu/education

ITCS Education Services provides quality computer training and education to the U-M community.

The Knowledge Navigation Center

<http://www.lib.umich.edu/knowledge-navigation-center>

The KNC is the U-M Library's center for learning how to use technology in teaching and research. You can drop in for assistance, or you can call ahead to make an appointment.

Taubman Health Sciences Library

<http://www.lib.umich.edu/taubman-health-sciences-library>

The Taubman Medical Library offers computer training classes and workshops.

Health and Well Being

University Health Service

www.uhs.umich.edu

(734) 764-8320

(734) 764-8325 for appt. scheduling

207 Fletcher St.

Hours: 8am-5:30pm M, T, W; 9am-5:30pm Th; 8am-4:30pm F; 9am-noon Saturday (changes by semester). Staff must pay or use billable insurance.

24-Hour U-M Emergency Lines

Emergency 911

SOS Crisis Center (734) 995-5444

U-M Psychiatric Emergency Services (734) 996-4747

Sexual Assault Prevention & Awareness Center (734) 936-3333

Psychiatric Emergency Services at University Hospital

(734) 936-5900

Next to Emergency Medicine at University Hospital, Floor B1, Room B1C204

Hours: 24 hours / 7 days

Anyone seeking emergency psychiatric care.

Psychological Clinic

www.psychclinic.org

(734) 764-3471

Suite 2463 East Hall

530 Church Street

Hours: 8am-5pm M-F

Open to all over 18, no need for U-M affiliation.

Outpatient Clinic – Department of Psychiatry

<http://www.psych.med.umich.edu/patient-care/ambulatory-psychiatry/>

(734) 764-9190, press 2

2101 Commonwealth Ave.

Hours: 8am-5pm M-F

Open to all over 18,
no need for U-M affiliation.

Health and Wellness

<http://www.hr.umich.edu/mhealthy/>

Places and services to keep you going strong.

MFit Drink Wise

<http://hr.umich.edu/mhealthy/programs/alcohol/>

MFit DrinkWise is a brief, confidential educational program that helps people avoid drinking problems by reducing or eliminating drinking.

MFit Nutrition Programs

<http://hr.umich.edu/mhealthy/programs/nutrition/>

MFit offers a variety of programs designed to assist with improving or maintaining healthy dining, cooking and eating programs including nutrition consultants and Ask the Dietitian.

Tobacco Consultation Services

<http://hr.umich.edu/mhealthy/programs/tobacco/>

TCS offers free individual and group sessions for staff members who wish to stop smoking.

U-Move Fitness Classes

<http://hr.umich.edu/mhealthy/programs/activity/>

Classes are for people who want to engage in regular physical activity and a healthy lifestyle.

Other

Athletic Events Tickets

www.mgoblue.com/tickets

You are eligible to purchase discounted tickets to U-M athletic teams' events.

Campus Disability Resource Directory

<http://www.umich.edu/Disability/>

This site provides general accessibility information, as well as information of particular interest to students, faculty and staff. Local, state and national disability resources are also included.

Parking and Transportation

www.pts.umich.edu/permit_parking

Faculty and staff may purchase parking permits for University lots and structures are available from Parking & Transportation Services. Parking is at a premium on campus so take some time to read through the website and/or stop in to talk with staff.

Recreational Facilities

www.recsports.umich.edu/facilities

As a postdoctoral fellow you are eligible to purchase discounted memberships for access to the University's outstanding facilities.

Work Life Resource Center

www.hr.umich.edu/worklife

The center can help employees with childcare, care for aging parents, and back-up child care. You can also get help with work/life balance issues and design of flexible work schedules.

Living in Ann Arbor

Ann Arbor, home to the University of Michigan, checks in at No. 8 on this year's list with a Wellbeing Index of 71.4
– Gallup's annual survey of well-being, 2013

Built on the banks of the Huron River and located 45 minutes west of downtown Detroit, Ann Arbor is a cultural mecca within the Midwest basin. It is home to the University of Michigan – one of the finest universities and premier health systems in the country - and offers a unique blend of city sophistication and small town charm that appeals to students and professionals, singles and families, newly born and newly retired, alike. It is both ethnically diverse and culturally rich. Just one visit and you will quickly understand why Ann Arbor is consistently voted one of the best places to live in the United States.

As a city that's always been at the top, Ann Arbor also finds a place on many other lists:

4th among “America's Most Livable Cities” in *Forbes Magazine* (2010) for:

- Low Unemployment Rank: 50
- Low Crime Rank: 41
- Income Growth Rank: 14
- Low Cost of Living Rank: 89
- Arts & Leisure Rank: 51

5th best city to live in the United States for its “college-town amenities, attractive downtown and educated population” according to *Cities Ranked & Rated*, 2nd Edition by Bert Sperling and Peter Sander (2007)

#1 Area for Knowledge Workers, *Expansion Management Magazine* (2007)

#3 Smartest City, *Forbes Magazine* (2006)

15th “Best Place for Singles” and 25th “Best Place to Live” in *Money Magazine* (2006)

Uniquely Michigan

<http://www.hr.umich.edu/um>

Two quick observations about the University are that it's huge and that it offers amazing access to extraordinary resources—if you know where to look. Start here!

Relocating and Settling In

Both the University and the city have a variety of sites that will provide information about available housing options and locations.

University of Michigan Campus and City Maps

<http://www.pts.umich.edu/maps/>

University of Michigan Housing Services

www.housing.umich.edu

Guide to Ann Arbor Neighborhoods

www.arborweb.com/housingindex.html

Ann Arbor Chamber of Commerce

<http://www.a2ychamber.org/>

While there is no longer a newspaper in circulation some of the same information is available at www.annarbor.com.

Transportation

Ann Arbor Transportation Authority (AATA)

www.theride.org

Faculty, staff and students may ride any bus on routes in Ann Arbor for free by swiping their valid University of Michigan identification card (MCard) when they board. All University and AATA shuttles and buses are lift-equipped. Please let the bus driver know if you need assistance boarding.

Zipcars

www.zipcar.com/umich

The University has its own Zipcar car-sharing program; information available.

Paratransit Service

The University's Paratransit Service offers door-to-door transportation free of charge to faculty, staff and students with either temporary or permanent physical disabilities. The service operates Monday through Friday, year round, except for official University holidays and season days. Register by calling (734) 763-3000.

For Partners, Spouses and Families

Employment at the University of Michigan

umjobs.org

Employment in Government

http://www.a2gov.org/government/city_administration/HumanResources/Pages/Home.aspx

Ann Arbor Public Schools

<http://www.a2schools.org/aaps/home>

Ann Arbor Private Schools

www.arborweb.com/cg/t0054.html

University of Michigan Child Care Resources and Referrals

www.hr.umich.edu/worklife/childcare

Washtenaw Literacy

<http://washtenawliteracy.org/>

Parks and Recreation

If you enjoy spectator sports, the Ann Arbor area offers an exciting range of top-ranked Big Ten teams to professional teams in Detroit, including the champion Red Wings, Pistons, and Tigers. There is a student discount available for tickets to games on campus, including football at the legendary Big House.

Staff can also participate in a wide variety of activities with programs in Intramural Sports, Club Sports, and Outdoor Adventures, or visit recreational facilities throughout campus.

Over 140 parks in the city of Ann Arbor allow outdoor enthusiasts to participate in all kinds of sports and recreational activities. Residents enjoy access to beautiful gardens and the city's large system of trails, many of which are located along the banks of the Huron River. These breath-taking locales offer activities ranging from canoeing and biking in the summer to cross country skiing and ice-skating in the winter.

Ann Arbor Parks & Recreation

www.a2gov.org/government/communityservices/ParksandRecreation

Huron-Clinton Metroparks

www.metroparks.com

Matthaei Botanical Gardens

<http://www.lsa.umich.edu/mbg/>

Nichols Arboretum

<http://www.lsa.umich.edu/mbg/see/nicholsarboretum.asp>

Washtenaw County Parks & Recreation

www.ewashtenaw.org/government/departments/parks_recreation

Arts and Entertainment

A diverse cultural life abounds in Ann Arbor. Venues both on and off campus contribute to the city's reputation for being one of the top presenters of the performing arts in the country. Did you know that Ann Arbor is the only city in the nation to host the Royal Shakespeare Company? Performances range from international talent to student productions. Live music can be found almost any night of the week around town. The School of Music, Theatre & Dance hosts almost daily performances that are free and open to all students. The University's Museum of Art is home to the state's second largest collection of art and regularly features traveling exhibitions.

Performing Arts

Ann Arbor Civic Theater
www.a2ct.org

Ann Arbor Current
www.ecurrent.com

The Ark
www.theark.org

Kerrytown Concert House
www.kerrytownconcerthouse.com

The Michigan Theater
www.michtheater.org

School of Music, Theatre and Dance
<http://www.music.umich.edu/>

The University Musical Society
www.ums.org

Local News and Information

Ann Arbor.com
annarbor.com

The Ann Arbor Chronicle
<http://annarborchronicle.com>

The Ann Arbor Observer
arborweb.com

The Michigan Daily
www.michigandaily.com

The University Record
www.ur.umich.edu

Michigan Public Radio
www.michiganradio.org

Michigan Public Television
<http://michigantelevision.org/>

Appendix

I. Compact Between Postdoctoral Appointees and Their Mentors

This Compact is modified from the version first published by the American Association of Medical Colleges. This document highlights the core values of the University of Michigan that pertain to postdoctoral fellows. This document also provides a starting point for useful and important discussions between postdoctoral fellows and their mentors.

This compact serves also as a pledge and a reminder to postdoctoral fellows and mentors that their personal conduct and commitments to one another should reflect the highest professional standards and mutual respect.

Postdoctoral training is an integral component for scholars and scientists as they advance in their professional careers. Postdoctoral appointees typically join an institution to further their training in a chosen discipline after obtaining a terminal degree (e.g., Ph.D., M.D., D.V.M.). This training is conducted in an apprenticeship mode where a postdoctoral fellow works under the supervision and guidance of a faculty mentor who is qualified to fulfill the responsibilities of a mentor. The postdoctoral fellow may undertake scholarship, research, service, and teaching activities that together provide a training experience essential for her/his career advancement.

Core Tenets of Postdoctoral Training

Institutional Commitment

The University of Michigan is committed to maintaining the highest standards of training and to provide a period of training sufficient to ensure that, when completed, the trainee can function independently as a scientific professional. Institutional oversight is provided for terms of appointment, salary, benefits, grievance procedures and other matters relevant to the support of postdoctoral appointees. The Rackham Graduate School is designated to provide this oversight and is available for the administrative support of postdoctoral affairs.

Quality Postdoctoral Training

Individuals should be trained to independently formulate meaningful hypotheses, design and conduct interpretable experiments, adhere to good laboratory practices, analyze results critically, understand the broad significance of their research findings and uphold the highest ethical standards in research. Developing additional skills—including oral and written communication, grant writing, and laboratory management—are considered integral to this training.

Importance of Mentoring in Postdoctoral Training

Effective mentoring is critical for postdoctoral training and requires that the primary mentor dedicate substantial time to ensure personal and professional development. A good mentor builds a relationship with the trainee that is characterized by mutual respect and understanding. Attributes of a

good mentor include being approachable, available and willing to share his/her knowledge; listening effectively; providing encouragement and constructive criticism; and offering expertise and guidance.

Foster Breadth and Flexibility in Career Choices

Postdoctoral appointees must have training experiences of sufficient breadth to ensure that they are prepared to pursue a wide range of professional career options. Effective and regular career guidance is essential and should be provided by the mentor and the institution.

Compact Between Postdoctoral Appointees and Their Mentors:

Commitments of Postdoctoral Appointees

- I acknowledge that I have the primary responsibility for the development of my career. I recognize that I must take a realistic look at career opportunities and follow a path that matches my individual skills, values and interests.
- I will develop a mutually defined research project with my mentor that includes well-defined goals and timelines. Ideally, this project should be outlined and agreed upon at the time of the initial appointment.
- I will perform my research activities conscientiously, maintain good research records, and catalog and maintain all tangible research materials that result from the research project.
- I will respect all ethical standards when conducting my research including compliance with all institutional and federal regulations as they relate to responsible conduct in research, privacy and human subjects research, animal care and use, laboratory safety, and use of radioisotopes. I recognize that this commitment includes asking for guidance when presented with ethical or compliance uncertainties and reporting on breeches of ethical or compliance standards by me and/or others.
- I will show respect for and will work collegially with my coworkers, support staff, and other individuals with whom I interact.
- I will endeavor to assume progressive responsibility and management of my research project(s) as it matures. I recognize that assuming responsibility for the conduct of research projects is a critical step on the path to independence.
- I will seek regular feedback on my performance and ask for a formal evaluation at least annually.
- I will have open and timely discussions with my mentor concerning the dissemination of research findings and the distribution of research materials to third parties.

- I recognize that I have embarked on a career requiring “lifelong learning.” To meet this obligation I must stay abreast of the latest developments in my specialized field through reading the literature, regular attendance at relevant seminar series and attendance at scientific meetings.
- I will actively seek opportunities outside the laboratory (e.g., professional development seminars and workshops in oral communication, scientific writing, and teaching) to develop the full set of professional skills necessary to be successful for my chosen career.
- At the end of my appointment, in accordance with U-M policy, I will leave behind all original notebooks, computerized files and tangible research materials so that other individuals can carry on related research. I will also work with my mentor to submit the research results for publication in a timely manner. I can make copies of my notebooks and computerized files, and have access to tangible research materials, which I helped to generate during my postdoctoral appointment according to institutional policy.

Compact Between Postdoctoral Appointees and Their Mentors:

Commitments of Mentors

- I acknowledge that the postdoctoral period is a time of advanced training intended to develop the skills needed to promote the career of the postdoctoral appointee.
- I will ensure that a mutually agreed upon set of expectations and goals are in place at the outset of the postdoctoral training period, and I will work with the postdoctoral appointee to create an individual career development plan.
- I will strive to maintain a relationship with the postdoctoral appointee that is based on trust and mutual respect. I acknowledge that open communication and periodic formal performance reviews, conducted at least annually, will help ensure that the expectations of both parties are met.
- I will promote all ethical standards for conducting research including compliance with all institutional and federal regulations as they relate to responsible conduct in research, privacy and human subjects research, animal care and use, laboratory safety and use of radioisotopes. I will clearly define expectations for conduct of research in my lab and make myself available to discuss ethical concerns as they arise.
- I will ensure that the postdoctoral appointee has sufficient opportunities to acquire the skills necessary to become an expert in an agreed upon area of investigation.
- I will provide the appointee with the required guidance and mentoring and will seek the assistance of other faculty and departmental/institutional resources when necessary. Although I am expected to provide guidance and education in technical areas, I recognize that I must

also educate the postdoctoral appointee by example and by providing access to formal opportunities/programs in complementary areas necessary for a successful career.

- I will provide a training environment that is suited to the individual needs of the postdoctoral appointee in order to ensure his/her personal and professional growth. I will encourage a progressive increase in the level of responsibility and independence to facilitate the transition to a fully independent career.
- I will encourage the interaction of the postdoctoral appointee with fellow scientists both intra- and extramurally and encourage the appointee's attendance at professional meetings to network and present research findings.
- I will ensure that the research performed by a postdoctoral appointee is submitted for publication in a timely manner and that she/he receives appropriate credit for the work she/he performs. I will acknowledge her/his contribution to the development of any intellectual property and will clearly define future access to tangible research materials according to U-M policy.
- I recognize that there are multiple career options available for a postdoctoral appointee and will provide assistance in exploring appropriate options. I recognize that not all postdoctoral appointees will become academic faculty. To prepare a postdoctoral appointee for other career paths, I will direct her/him to the resources that explore nonacademic careers, and discuss these options.
- I will commit to being a supportive colleague to postdoctoral appointees as they transition to the next stage of their career and, to the extent possible, throughout their professional life. I recognize that the role of a mentor continues after the formal training period.

II. Individual Development Plan for Postdocs

Individual Development Plans (IDPs) provide a planning process that identifies both professional development needs and career objectives. Furthermore, IDPs serve as a communication tool between postdoctoral fellows and their mentors. IDPs have been incorporated into performance review processes in many organizations, and can be considered one component of a career development plan.

Goals

Help individuals identify:

- Long-term career options and the necessary tools to pursue them
- Short-term needs for improving current performance

Benefits

Postdoctoral fellows will have a process that assists in developing long-term goals. Identifying short-term goals will give you a clearer sense of expectations and help identify milestones along the way to achieving specific objectives. The IDP also provides a tool for communication between a postdoctoral fellow and a faculty mentor.

Outline of IDP Process

The development, implementation and revision of the IDP requires a series of steps to be conducted by the postdoctoral fellow and their mentor. These steps are an interactive effort, and so both the postdoctoral fellow and the mentor must participate fully in the process.

Basic Steps

For Postdoctoral Fellows

1. Conduct a self-assessment
2. Survey opportunities with mentor
3. Write an IDP, share with mentor and revise
4. Implement the plan and revise as needed

For Mentors

1. Become familiar with available opportunities
2. Discuss opportunities with postdoc
3. Review IDP and help revise
4. Establish regular review of progress and help revise the IDP as needed

A national online IDP tool from *Science Magazine*:

From *Science Careers*: <http://myidp.sciencecareers.org/>

Individual Development Plan for Postdocs

Execution of the IDP Process for Postdoctoral Fellows

Step 1. Conduct a self-assessment

- Assess your skills, strengths and areas that need development. Formal assessment tools can be helpful.
- Take a realistic look at your current abilities. This is a critical part of career planning. Ask your peers, mentors, family and friends what they see as your strengths and your development needs.
- Outline your long-term career objectives. Ask yourself:
 - What type of work would I like to be doing?
 - Where would I like to be in an organization?
 - What is important to me in a career?

Step 2. Survey opportunities with mentor

- Identify career opportunities and select from those that interest you.
- Identify developmental needs by comparing current skills and strengths with those needed for your career choice.
- Prioritize your developmental areas and discuss with your mentor how these should be addressed.

Step 3. Write an IDP

The IDP maps out the general path you want to take and helps match skills and strengths to your career choices. It is a changing document, since needs and goals will almost certainly evolve over time as a postdoctoral fellow. The aim is to build upon current strengths and skills by identifying areas for development and providing a way to address these. The specific objectives of a typical IDP are to:

- Establish effective dates for the duration of your postdoctoral appointment.
- Identify specific skills and strengths that you need to develop (based on discussions with your mentor).
- Define the approaches to obtain the specific skills and strengths (e.g., courses, technical skills, teaching, supervision) together with anticipated time frames.

- Discuss your draft IDP with your mentor.
- Revise the IDP as appropriate.

Step 4. Implement your plan

- The plan is just the beginning of the career development process and serves as the road map. Now it's time to take action!
- Put your plan into action.
- Revise and modify the plan as necessary. The plan is not cast in concrete; it will need to be modified as circumstances and goals change. The challenge of implementation is to remain flexible and open to change.
- Review the plan with your mentor regularly. Revise the plan on the basis of these discussions.

Individual Development Plan for Postdocs

Execution of the IDP Process for Mentors

Step 1. Become familiar with available opportunities

By virtue of your experience you should already have knowledge of some career opportunities, but you may want to familiarize yourself with other career opportunities and trends in job opportunities (refer to sources such as National Research Council reports and Science career reviews; see also Resources: Career Opportunities at the end of this document).

Step 2. Discuss opportunities with postdoc

This needs to be a private, scheduled meeting distinct from regular research-specific meetings. There should be adequate time set aside for an open and honest discussion.

Step 3. Review IDP and help revise

Provide honest feedback – both positive and negative – to help postdoctoral fellows set realistic goals. Agree on a development plan that will allow postdoctoral fellows to be productive in the laboratory and adequately prepare them for their chosen career.

Step 4. Establish regular review of progress

The mentor should meet at regular intervals with the postdoctoral fellow to assess progress, expectations and changing goals. On at least an annual basis, the mentor should conduct a performance review designed to analyze what has been accomplished and what needs to be done. A written review is most helpful in objectively documenting accomplishments. (An example is provided as an attachment – this can be modified to fit the needs of the postdoc and mentor).

Sample Annual Review

<http://opa.faseb.org/pdf/SampleAnnualReview.pdf>

The above document was developed by the Federation of American Societies for Experimental Biology (FASEB)'s Science Policy Committee.

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Individual Development Plan Resources

Self Assessment

- Fiske, P. S. (2001). *Put Your Science to Work: The Take-Charge Career Guide for Scientists*. Washington, D.C.: American Geophysical Union.
- Bolles, R. N. (2002). *What Color Is Your Parachute? A Practical Manual for Job-Hunters and Career-Changers*. Berkeley, Calif.: Ten Speed Press.

The Postdoc Experience

- Kern, S. (2002). *Fellowship Goals for PhDs and MDs: A Primer on the Molecular Biology Postdoctoral Experience*. *Cancer Biology and Therapy* 1: 74-75.
- National Academy of Sciences. (2000). *Enhancing the Postdoctoral Experience for Scientists and Engineers: A Guide for Postdoctoral Scholars, Advisers, Institutions, Funding Organizations, and Disciplinary Societies*. Washington, D.C.: National Academy Press.

Career Opportunities

- American Association for the Advancement of Science. Science's Next Wave.
<http://sciencecareers.sciencemag.org/>
- The Scientist. Archives: Profession.
<http://www.the-scientist.com/?articles.list/categoryNo/2924/category/Careers/>
- The Chronicle of Higher Education. Career Network Advice Columns.
<http://chronicle.com/jobs/>
- National Postdoctoral Association ADVANCE
<http://nationalpostdoc.org/advance>.

- Federation of American Societies for Experimental Biology. (1997). *Graduate Education: Consensus Conference Report*. Bethesda, M.D. FASEB.
<http://www.faseb.org/Policy-and-Government-Affairs.aspx#sthash.DScEksuL.dpbs>
- Heiberger and Vick, eds. (1996). *The Academic Job Search Handbook* (2nd ed.). University of Pennsylvania Press.
- Reis, R. M. (1997) *Tomorrow's Professor. Preparing for Academic Careers in Science and Engineering*. New York: IEEE Press. 1997.
- Listserv: Tomorrow's Professor.
<http://cgi.stanford.edu/~dept-ctl/cgi-bin/tomprof/postings.php>
- Barker, K. (2002). *At the Helm: A Laboratory Navigator*. Cold Spring Harbor, NY: Cold Spring Harbor Laboratory Press.

Resources on Non-Academic Careers

- Robbins-Roth, C. ed. (1998). *Alternative Careers in Science. Leaving the Ivory Tower*. San Diego, Calif.: Academic Press.
- Kreeger, K. Y. (1999). *Guide to Nontraditional Careers in Science*. London: Taylor & Francis Group.

* These resources are not considered endorsements, per se.

III. Annual Evaluation for Research Fellows

The research fellow should complete assessment and then the PI will be given the opportunity to make his/her comments.

Please comment on the following:

Interpersonal skills and ability to work with the lab team

This refers to such items such as cooperation with others, fostering lab growth, reliability, etc.

Postdoc Comments:

Mentor Comments:

Communication Skills

Consider written and oral communication, level of clarity, presentation skills and so on.

Postdoc Comments:

Mentor Comments:

Research Skills

These include innovation, data interpretation, applying new techniques, taking ownership of projects, evaluating and improving current protocols.

Postdoc Comments:

Mentor Comments:

Other Skills

For example, reads and evaluates literature, assists with writing grant proposals, participating in department or national meetings, teaching and mentoring, leadership skills.

Postdoc Comments:

Mentor Comments:

List Accomplishments

Include publications, conference presentations, local lectures, grants or awards, grants pending, etc.

Postdoc Comments:

Mentor Comments:

Development Plan

To be filled out by the mentor and discussed with the research fellow.

Review and discuss job expectations and develop a plan to successfully complete the postdoc appointment and to prepare him/her to meet personal goals.

Targeted Development Areas	Goals for Upcoming Year
<i>List interpersonal, communication and/or analytical skills to focus on</i>	<i>How will the achievement of goals be determined or benchmarked?</i>

I have discussed the contents of this report with my mentor.

Postdoctoral fellow signature:

Date:

Principal Investigator signature:

Date:

VI. Excerpt from the University of Michigan *Standard Practice Guide*

<http://spg.umich.edu/>



UNIVERSITY OF MICHIGAN STANDARD PRACTICE GUIDE

SECTION:	Personnel	Number:	201.19
SUBJECT:	Postdoctoral Research Fellows	Revised:	04/30/2010
APPLIES TO:	Research Fellows and Senior Research Fellows	Date Issued:	
ISSUED BY:	Office of the Provost and Executive Vice President for Academic Affairs and University Human Resources	Review Date:	04/30/2014
OWNER:	Office of the Provost and Executive Vice President for Academic Affairs	Attachments:	1

I. Policy

Since postdoctoral research training is a valuable educational path for scholars in certain academic fields, the University provides opportunities for individuals to be appointed as Research Fellows or Senior Research Fellows while receiving such training. Each Fellow's hiring unit should assign a tenured or tenure track instructional or research faculty member to provide mentorship to him or her.

II. Regulations and Definitions

A. Titles and Term of Appointments

1. Units at the University will use the title of Research Fellow when appointing individuals who already possess either a terminal doctoral degree (i.e. Ph.D.) or a professional doctorate (e.g., M.D., D.D.S, D.V.M.) and who are pursuing advanced scientific or scholarly training, which may be in a clinical setting but is outside of the traditional clinical service and does not involve direct patient care.
2. Units may appoint Fellows as either Research Fellow or Senior Research Fellow, as appropriate to the circumstances. Research fellowships should be for one year or less, with the possibility of renewal in subsequent years, not to exceed a total of five years of postdoctoral training.
3. Before extending an appointment offer, the hiring unit must first identify resources to support the appointment for the entire length of the appointment. If circumstances arise that require the hiring unit to terminate a Research Fellow appointment before the specified appointment end date, before notifying the Fellow the hiring unit should first consult with the appropriate Dean or Director and the Office of Academic Human Resources.
4. Research Fellows are appointed for the purpose of providing them with advanced training as described above in section II.A.1. At the outset of the appointment, the faculty member who has been assigned as a mentor to the Fellow should communicate the hiring unit's standards regarding the responsibilities of the individual Research Fellows and the unit's expectations for how they should progress through their training. Like all members of the University community, it is the responsibility of each Research Fellow to perform all related activities to the best of his or her ability, in a collegial manner and with the highest standards of integrity.



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5. Typically and under the appointment terms, Research Fellows will receive a salary, regardless of fund source, for the services the unit expects them to perform. The most common arrangement is for the individual's training to be accomplished through the performance of obligations on a sponsored grant or contract.
 6. Research Fellows who are paid via a fellowship, regardless of fund source, under which no service to the University is required, are considered "scholar trainees." The hiring units of "scholar trainees" may charge the cost of their fellowships to training grants, fellowships or various other University funds designated for such purposes. Appointments of such individuals will be at "0%" effort, with an Additional Pay Earnings Code of FEL that labels the money the unit will pay to the trainee as a fellowship.
 7. Hiring units will use the title of House Officer for persons with professional doctorates whose training will involve patient care responsibilities, in a manner consistent with provisions of the contract between the University and the House Officers Association.
 8. Research Fellows whose program of activities will involve classroom teaching as an "officer of instruction" must hold a separate appointment for this responsibility in a manner consistent with provisions of the contract between the University and the Lecturers' Employee Organization.
- B. Support of Research Fellows
Hiring units may pay fellowships and/or salaries and associated benefit costs with the type of funds described below:
1. Externally funded training grants or fellowships, which may be administered through the University or paid directly by the granting agency to the Fellow.
 2. Sponsored research projects, when such training is consistent with the terms of the grant or contract.
 3. University general funds or other funds.
- C. Approval of Research Fellows
1. Before a mentor makes any type of commitment to hire a Research Fellow, the appointment must be approved by the Chairperson or the Dean/ Director of the teaching or research unit in which the appointment is to be made. Before approving a Research Fellow appointment, the Dean or Director will assure that the hiring unit has met the terms described below:
 2. The hiring unit has identified or will be able to identify appropriate fund sources to cover the cost of the Fellow's fellowship and/or salary and the required University contributions to fringe benefits associated with the fellowship.
 3. The hiring unit is able to make space available for the Fellow's use.



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4. The mentor and the Fellow have agreed upon a proposed training program that will enhance the Fellow's scholarship and ability as a researcher.
5. The hiring unit has a conflict resolution process available to the Fellow to raise concerns or problems connected with the fellowship. (Attachment 'A' provides a generic sample of such a process. Appointing units should devise guidelines appropriate to their own culture and organizational context).

D. Terms and Benefits of Research Fellow appointments:

All Research Fellows will:

- 1) Be required to enroll themselves and their dependents, as necessary, in the University group health and dental plans using the same rate structure that applies to University staff. The University may waive the requirement to enroll if the Fellow is covered by equivalent insurance, or for religious reasons. If the Fellow fails to enroll within thirty days after appointment, the Fellow will be enrolled as a one-person subscriber.
- 2) Have the opportunity to enroll in the University group life insurance program at the same cost and under the same conditions as University faculty and staff
- 3) Be covered by the University's worker's compensation insurance and, when travelling on University business, by the University's travel accident insurance
- 4) Be listed in the appropriate University directory(ies)
- 5) Have access to the University's libraries on the same basis as research faculty
- 6) Have the opportunity to use recreational facilities and to purchase athletic event tickets and University parking permits under the same conditions and at the same cost as for University faculty and staff
- 7) Upon certification by the mentor of successful completion of training, the Office of the Vice President for Research will issue a suitable recognition to the Fellow and will notify the Alumni Records Office for inclusion of the Fellow in its records.
- 8) Fellows who receive a salary through their appointments, as described in section II A. 5., are eligible for:
 - a. Annual vacation allowance equivalent to one month in twelve (22 workdays) for fellows appointed in yearlong increments. Fellows who are either part-time (i.e. less than 100% effort) or who are appointed for at least six months but less than one year shall receive a pro-rata vacation allowance. Fellows must take vacation time during the



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annual appointment period. The University will not provide pay in lieu of time off.

- b. Up to three weeks per year of paid sick leave, if unable to fulfill responsibilities because of personal sickness, childbirth, or injury. The Fellow may also use the three weeks of paid leave to care for a family member due to personal sickness, childbirth, or injury, or to care for his or her newly born, newly adopted or newly fostered child.

Note: Appointing units must maintain records related to attendance and usage of vacation or sick leave allocations described in D. 8.a. and b. above. No attendance or absence records are maintained for Research Fellows by the Payroll Office or other central units. University costs associated with vacation and sick leave will be assigned to the account from which the Fellow's salary is paid. If the account is insufficient to cover the full cost of benefits, the unit must notify the appropriate fund area of Financial Operations and identify another suitable account to which the benefit costs can be charged.

E. Withholding of Taxes and Reporting of Income

1. Federal and State income taxes and FICA taxes will be withheld and a Form W-2 filed with the IRS for Research Fellows as described in section II. A. (5.) above.
2. Exception: No Federal, State or FICA taxes will be withheld from payments issued to Fellows who are "scholar trainees" (as described in section II. A. 6.) because such payments are not considered "wages." It is, however, "income" to the Fellow and may be taxable under Federal and State law.

Because a Form W-2 will not be issued, fellows may contact the Payroll Office to request a "fellowship letter" that will state the amount of fellowship received. The Fellow may use this letter as documentation when filing annual tax returns.

F. Selection

Given the variety of existing postdoctoral programs, there are no uniform search or selection procedures that hiring units must follow prior to appointing an individual in a Research Fellow position. However, hiring units must observe University policies on non-discrimination and make good faith efforts to develop broad and inclusive selection pools when undertaking searches. When a hiring unit wants to move a Research Fellow to a regular faculty or staff appointment, it should follow the customary recruitment policies and procedures described in SPG 201.22 *Recruitment and Employment Process (Regular)*.

Procedures: <http://hr.umich.edu/procedures/spg201-19.html>

Note: While this is currently a component of *SPG* 201.19, the most current relevant resources for assistance with dispute resolution are available at <http://hr.umich.edu/acadhr/researchfellows/dispute.html>



**UNIVERSITY OF MICHIGAN
STANDARD PRACTICE GUIDE**

ATTACHMENT A

Generic Sample Grievance Procedure
for Research Fellows and Senior Research Fellows

Applicability

The following procedures are available to Research Fellows who wish to complain of any action or inaction, within the jurisdiction or control of (name of unit), which the Fellow alleges to be in violation of law or University policy or to be unfair, arbitrary, or capricious.

- A. The fellow shall seek first to resolve the matter by informal means through his or her mentor/supervisor.
- B. If the matter is not satisfactorily resolved satisfactorily, the Fellow shall then seek resolution by informal means through the mentor/supervisor's Department chair, division chief (in the Medical School), Associate Dean/Associate Director, or other designated official in units without a departmental structure.
- C. If the matter is still not satisfactorily resolved, the Fellow may request resolution by the Dean or Director of (unit). The Fellow shall file a written statement with the Dean or Director stating the alleged wrong, the facts that the Fellow believes support the allegations, and the disposition of the matter at prior informal steps.
- D. The Dean or Director shall seek to resolve the matter promptly.
 1. The Dean or Director may seek advice from an appropriate standing committee, or establish an ad hoc committee for advice on the matter.
 2. Before the Dean or Director decides a case, he or she should consult with the Office of Academic Human Resources or the Office of the General Counsel to assure correct and consistent interpretation of University policy and/or the law.

When the Dean (or Director) decides the matter, the Dean or Director or his or her designee will convey to the Fellow in writing the decision and the reasons for it.