Professional Development and Academic Advancement: Define Your PMS (Professional Mission Statement)

OSU COMER CONFERENCE 2009
John D. Mahan, MD
Professor of Pediatrics, OSU COM

Overview

- Background
- Case of Tina
- Academic Career Planning – 5 Key Steps
  - Career Stage (#1)
    - Self-Assessment
  - PMS Draft (#2)
- Break
- Current Projects List (#3)
  - Self-Assessment
- Characteristics of Successful Academic Faculty – 4/20 Habits
  - Define Your Habits (#4)
- Priority Projects Plan (#5)
- Portfolio discussion
- Wrap-up
Chinese Proverb

If we don’t change our direction, we are likely to end up where we are headed.
Goals

- Define and accomplish your professional success
- Improve your likelihood for academic promotion
- Enhance your individual satisfaction

Objectives (at the end of this workshop, the learner will be able to:)

- Describe successful professional development strategies
- Develop a rudimentary PMS and plan
- Identify your professional needs
- Identify academic resources
- Define the value of collaboration
- Understand documentation/portfolio (teaching) concepts
Successful Professional Development Strategies

1. Outline a realistic vision
   - personal priorities
   - opportunities

2. Identify and utilize resources
   - colleagues, networks
   - education/training

3. Develop written plan – review with mentor

4. Document achievement

5. Ensure recognition
   - supervisor buy-in
   - publications, presentations
   - P&T, marketing

The Vision:
Your Professional Mission Statement (PMS)

◆ Identify personal goals and interests
  - What do you value?
  - What does the organization value?
  - Share with mentor and colleagues
  - Revisit often

◆ Define desired rewards
  - Set priorities!
  - Productivity
  - No surprises

◆ Identify requirements for the next step
Case of Brenda

- Now finishing 1st yr as Pediatric Residency Program Director
- Had been general pediatrician (Assistant Prof) in Ambulatory Pediatrics Division for 5 yrs
- Great record as teacher
- Clinical time reduced from 7 to 4 half days with PD position
- Her immediate program goals are to improve recruiting and continuity clinic
- Chair expects her to do some research and present at national meetings, in addition to PD and clinic responsibilities. He also mentioned need to upgrade program competencies assessments
- “Oh, by the way, we have RRC site visit later this year that you need to get working on”
- She just found out that she is up for promotion at the end of the academic year – the chair is concerned that she had “not done much academically” – the stress is mounting!
- Should she continue working in the residency program? What is wrong here? What should she do now?

Case of Richard

- Now finishing 3rd yr as a physician (Assistant Professor) in Tenure track
- Graduated from a top tier fellowship program with excellent research training and intense desire to continue research career
- On service only 2 months a year - great reviews as teacher and clinician
- Took longer than expected to get research enterprise (people, resources, local collaborators) up and going – has only one local collaborator
- Division Director expects him to focus on his research and publish, submit a large national grant each year and present at national meetings
- His productivity has been less than desired but he feels that he is getting momentum now – he spends 8-12 hrs each weekend on his research
- The Division Director calls him in and explains that he may not qualify for additional internal support due to lack of publications and grant proposals
- He needs to submit a NIH grant in the next 6 months – if he does not get a competitive score, his research career will be in jeopardy!
- Should he continue to work this hard on his research? What is wrong here? What should he do now? What could have been done earlier?
Case of Rick

- Now finishing 3rd yr as a scientist (Assistant Professor) in Tenure track
- Graduated from a top tier university with excellent research training and intense desire to continue research career
- Teaches one course at the university each year - great reviews as teacher
- Took longer than expected to get research enterprise (people, resources, local collaborators) up and going – has only one local collaborator
- Center Director expects him to focus on his research and publish, submit a large national grant each year and present at national meetings
- His productivity has been less than desired but he feels that he is getting momentum now – he spends 8-12 hrs each weekend on his research
- The Center Director calls him in and explains that he may not qualify for a competitive score, his research career will be in jeopardy!

Case of Tina

- Now finishing her 4th yr as Assistant Professor in Clinician/Educator track
- Graduated from strong residency and fellowship programs – very interested in patient care and teaching
- On service 8 months a year – very good reviews as teacher and clinician
- Recently she realized that to get promoted on the C/E track (in year 6), she will need to have a publication record of 2-3 clinical articles/reviews each year
- She was recently given the opportunity to join the medical school selection committee – 2 half days per week for 6 months a year – she did this type of service during residency and love it!
- How will she balance this opportunity with her other demands? What are the threats here? What should she do now? What could have been done earlier?
Academic Career Planning
5 Key Steps

- Define Your Present Academic Career Stage
  - self assessment
- Your Professional Mission Statement
- Define Your Current Project List
- Describe the Characteristics of Successful Academic Faculty – 4/20 Habits
  - how many you display and can adopt
- Define Your Priority Projects Plan
  - your self-defined future priorities

Career Stages – Self-Assessment:
Important Considerations

- Interest – Themes
- Concerns – Threats
- Tasks – Required, desired
- Stress level
- Willingness to collaborate
Career Stage (#1)
Self-Assessment

• Individual work
• Individual revision
• Small group share/critique
• Final draft

PMS Draft

Why is this so important? Have you described what you're doing rather than why? How will having your draft be useful?

What is the audience going to do? What do you want the audience to get from your draft?

Potential ideas/thoughts for draft 3
Current Project List

• Individual work
• Discussion
Characteristics of Successful Academic Faculty – 4/20

Habits

<table>
<thead>
<tr>
<th>Trait</th>
<th>Agree</th>
<th>Strongly Agree</th>
<th>Disagree</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. A clear, well-defined, self- motivation</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2. Have a clear plan about what I do and how I do it</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>3. A well-defined, self-motivated learner</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>4. A clear, well-defined plan about what I do and how I do it</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>5. A clear, well-defined plan about what I do and how I do it</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>6. A clear, well-defined plan about what I do and how I do it</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>7. A clear, well-defined plan about what I do and how I do it</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>8. A clear, well-defined plan about what I do and how I do it</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>9. A clear, well-defined plan about what I do and how I do it</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>10. A clear, well-defined plan about what I do and how I do it</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>11. A clear, well-defined plan about what I do and how I do it</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>12. A clear, well-defined plan about what I do and how I do it</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>13. A clear, well-defined plan about what I do and how I do it</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>14. A clear, well-defined plan about what I do and how I do it</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>15. A clear, well-defined plan about what I do and how I do it</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>16. A clear, well-defined plan about what I do and how I do it</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>17. A clear, well-defined plan about what I do and how I do it</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>18. A clear, well-defined plan about what I do and how I do it</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>19. A clear, well-defined plan about what I do and how I do it</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>20. A clear, well-defined plan about what I do and how I do it</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Note: The table above lists traits that are important for successful academic faculty. The columns represent the level of agreement (Agree, Strongly Agree, Disagree).
Resources

◆ Your mental check list: used by highly effective faculty 4/20 (20 habits in 4 areas of activity of successful academic faculty):
  ■ Colleagues
  ■ Environment
  ■ Personal style/self management
  ■ Citizenship

Colleagues

◆ Associate and collaborate with distinguished colleagues
◆ Network: seniors, peers, admin. and staff
◆ Collaborate: writing, teaching, research and administration
◆ Regular contact inside and outside institution
◆ Borrow and offer resources
Environment

- Local peers academically productive
- Supportive work climate / resources
- >10% protected time for academics
- Institution supports pursuit of topics you deeply value
- Chair appreciates and values your work

Successful Style

- Be productive in first 5 years
- Work in small bursts
- Attack several projects simultaneously
- Pursue topics of personal interest, consistent with your values and mission
- Work with some degree of perceived autonomy
- Take risks
Citizenship

- **National** - Regularly attend national meetings
- **Regional** - Active in regional and national programs
- **Local** - Active on medical school / hospital committees, working groups, curriculum committees
- Network with other good citizens to drive your agenda (or their agenda)

Priority Projects Plan (#5)

- Create Your Priority Projects Plan
## Academic Plan: Goals and Metrics: Priority Projects Plan

### Worksheet for Priority Project (Tasks x Timetables)

<table>
<thead>
<tr>
<th>Project Title</th>
<th>Priority</th>
<th>Key Dates</th>
<th>Key Reference</th>
<th>Completion</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

## Academic Plan: Goals and Metrics

### Name Performance Evaluation and Metrics

<table>
<thead>
<tr>
<th>Goals/Measures</th>
<th>Weight (% of Lead)</th>
<th>Threshold Performance</th>
<th>Target Performance</th>
<th>Max Performance</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Academic Portfolio - Document Your Accomplishments

- Statement of philosophy on teaching
- Teaching/Learner evaluations
- Representative syllabi/course materials
- Every new committee, work group, assignment
- Every journal you review
- Every publication, abstract, invited presentation
- Every grant
- In total - the Portfolio is Your Career!
Homework

- Re-visit your PMS (quarterly?) – share with your supervisor
- Revisit your 4/20 Habits as part of your yearly planning
- Create and use your Priority Projects List
- Live your plan

Thanks

- Deborah Simpson, Ph.D. Professor, Family and Community Medicine, Associate Dean for Educational Support and Evaluation Medical College of Wisconsin
- Lewis R. First, M.D. Professor and Chair, Pediatrics, University of Vermont School of Medicine
- Ed Zalneraitis, MD. Pediatric Program Director, Professor and Associate Dean, University of Connecticut