# Wellbeing-Individual Development Plan – UNC Department of Pediatrics

**Individual Development Plans (IDP’s)**

Individual Development Plans (IDPs)provide mentees and their mentors with a structured planning and implementation process for the mentee’s career development pathway. Aligning individual mentee priorities with their career and organizational outcomes, these plans provide a structured process for goal setting, accountability and achievement, with an emphasis on professional skill development, career growth, organizational engagement and individual performance and productivity.

This Wellbeing-IDP tool was developed by exchanging traditional IDP components for career-based vision, skills and activities, timeline, accountability, and outcomes for wellbeing-driven components in order to help identify and develop both short- and long-term plans to achieve and maintain wellbeing. The pages that follow walk you through developing your own WB-IDP for vision-setting, strategic planning, motivation, and accountability.

## Outline of the WB-IDP Process

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| --- | --- | --- |
| **Step** | **Activity** | **Page** |
| **Step 1** | **Identify Who Will Support You in Your WB-IDP Creation:** Chose whether or not you will use a professional health coach and who else may assist you in the process. | **1** |
| **Step 2** | **Conduct a Wellbeing Assessment:** Identify where you are strong in wellbeing optimization, and where you would like to focus your attention for your wellbeing development efforts. | **2** |
| **Step 3** | **Develop your Plan**: Design a vision for your wellbeing using “SMART” (specific, measurable, achievable, realistic, and time-bound) outcome goals and 3 Ss (Self-care, Social support, Services) to achieve that vision. | **3** |
| **Step 4** | **Implement and Assess your Plan:** Identify what has worked well (Strengths) and where you had challenges (Weaknesses), and look for Opportunities and Threats going forward. | **3** |
| **Step 5** | **Track and Refine your WB-IDP, and Evaluate Your Success:** Reflect upon your progress and makes adjustments as needed. | **4** |

## Creating and Executing Your WB-IDP

**Step 1: Identify Who Will Support You in Your WB-IDP Creation**

The WB-IDP is meant to be developed with external input, whether you choose a professional (board-certified) coach to assist you, another professional (eg, counselor, spiritual leader), a friend/peer, family member, colleague, mentor, or all of the above. This source of external input is to provide you with thought partnership, support, motivation, encouragement and accountability throughout the WB-IDP planning and implementation process.

List the names of those you identified to support you in your goals. If you lack a support network, then determine a timeline to identify your network and list some names you are considering.

Name of your coach or other professional:

Name of your friend/peer:

Name of other support:

## Step 2: Conduct a Wellbeing Assessment

This step is designed to help you to define where you are already strong in wellbeing optimization, and where you would like to focus your attention for your wellbeing development efforts moving forward using the World Health Organization Wellbeing Index (WHO-5).

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| --- | --- | --- | --- | --- | --- | --- |
| **WHO5 - Comprehensive wellbeing** | **All of  the time** | **Most of the time** | **More than half of  the time** | **Less than half of the time** | **Some of the time** | **At no time** |
| "Over the last 2 weeks…." |  |  |  |  |  |  |
| 1. I have felt cheerful and in good spirits | 5 | 4 | 3 | 2 | 1 | 0 |
| 2. I have felt calm and relaxed | 5 | 4 | 3 | 2 | 1 | 0 |
| 3. I have felt active and vigorous | 5 | 4 | 3 | 2 | 1 | 0 |
| 4. I woke up feeling refreshed and rested | 5 | 4 | 3 | 2 | 1 | 0 |
| 5. My daily life has been filled with things that interest me | 5 | 4 | 3 | 2 | 1 | 0 |

To score your responses to the WHO-5 Comprehensive wellbeing:

* Calculate the raw score by totaling the scores of the 5 answers. The raw score ranges from 0 to 25, 0 representing worst possible and 25 representing best possible quality of life. Percentage scores ranging from 0 to 100 are obtained by multiplying the raw score by 4.
* Per WHO-5 guidelines, a total score below 13 indicates poor wellbeing and is an indication for testing for depression. *If your total score is below 13 or if you answered 0 or 1 to any of the 5 items, please consult your healthcare provider for further evaluation.*

Using the WHO-5 for Self-Evaluation: Layers (Dimensions) of Wellbeing:

In addition to being used in aggregate for your comprehensive wellbeing as noted above, each question from the WHO-5 questionnaire can also give you a glimpse into your experience of the 5 main layers or dimensions of well-being as described below.[S. Carmack, S. Kennedy. APHA Annual Meeting 2017]

1. Emotional Wellbeing = feeling of cheerfulness and good spirits (happiness/joy)
2. Mental Wellbeing = feeling of being calm and at ease (thoughts not racing)
3. Physical Wellbeing = feeling of being active and vigorous (having physical energy)
4. Social Wellbeing = feeling of being refreshed and rested (receiving support/resources needed to function/thrive and avoid overwhelm/stretched too thin)
5. Purpose Wellbeing = feeling interesting and meaningful to you (spiritual, beyond self)

**Step 3:** **Identify SMART Goals, and Selfcare, Social Support, and Services**

Identify your big picture vision for your comprehensive wellbeing. If you are struggling to identify what this is, journaling, art, exercise, and brainstorming with someone in your network my help. Your vision integrates and aligns your career priorities, with your personal work/life integration and lifestyle needs. After you have created your vision, it is time to create a pathway to making it a reality. This is where identifying “SMART” (specific, measurable, achievable, realistic, and time-bound) goals for achieving your vision comes in.

Writing SMART Goals:

**Specific** Write out specific activities you can do to work towards your goal (eg, what it is, how you will do it, where it will be done, when it will occur, and with whom)

**Measurable** Identify how you can track/measure adherence to your specified activities (eg, charting on calendar, with an app, in a journal, through buddy system)

**Attainable** Identify potential barriers to your specified activities and work with your coach to brainstorm how to remove barriers; put on hold anything that does seems infeasible in the next month; list which activities you can accomplish this month even if they seem small or easy.

**Relevant** Prioritize your specified attainable activities into what directly supports your goal, and what you are motivated by. What brings energy and joy to you?

**Time-based** Plan a monthly timeline for what days you will do which activity for how long. Create a feasible timeline that you can hold yourself accountable to.

This can be further refined by thinking in terms of the frequency of implementing your activities through the 3 Ss of: Daily Selfcare, Weekly Social-Support, and Monthly Services (Well-Being Ultimatum, Carmack S.):

* Self-care Daily – What daily self-care goals would you like to set for yourself? For example:
  + Physical wellbeing activity: walk, schedule health appointment, take needed medication
  + Financial wellbeing activity: schedule financial advisor appointment
  + Mental wellbeing activity: meditate, read, connect, down time/rest
  + Emotional wellbeing activity: meditate, yoga, connect, spend time outside
* Social Support Weekly – What activities provide you with social engagement/network?
* Services Monthly – What professional/s or services could help you to achieve your goals?

You can use a calendar, journal, vision board, or the table below to help you plan and hit your milestone goals. Start by working backwards from where you want to be 3 months (or however long you want) from now. For this personal wellbeing weekly plan, specify self-care activities and take time to explore the potential use of university and other relevant professional resources to help you to achieve your monthly milestones and realize your vision more effectively and efficiently.

|  |  |
| --- | --- |
| SMART goals Month 3: | Week 12 |
| Week 11 |
| Week 10 |
| Week 9 |
| SMART goals Month 2: | Week 8 |
| Week 7 |
| Week 6 |
| Week 5 |
| SMART goals Month 1: | Week 4 |
| Week 3 |
| Week 2 |
| Week 1 |

**Step 4: Assess Your Plan**

## With your WB-IDP in place and your network ready to support you, it is time to implement your plan and achieve the milestone goals you set up in your plan – weekly, monthly and annually. In this phase, it is important that you set appointments with your coach/support network on a regular basis who can help you with motivation, support, and accountability as needed and help you to revise (tweak) your plan due to unforeseen environmental, professional, or personal priority changes.

Strength, Weakness, Opportunity, Threat (SWOT) Analysis

Conduct a SWOT analysis, looking at what strengths you can apply to your plan and identifying previous challenges you have had in the past that may undermine your plan. Also look forward to seewhat you may be able to leverage or create to assist with your plan as well as what may impede your progress.

|  |  |  |  |
| --- | --- | --- | --- |
| **Looking Backward…**  What has worked well (strengths)?  What has not worked well (weaknesses)? | | **Looking Forward…**  What opportunities can you now see?  **What poses a threat to those opportunities?** | |
| **Strength**  **Successes** | **Weakness**  **Struggles** | **Opportunity**  **(What’s Next?)** | **Threat**  **(What’s In the Way?)** |
|  |  |  |  |

## Tips to assist with Step 4:

## Align your activities with your values and interests will help you stay motivated.

## Incorporate your activities into your daily routine will help make them sustainable.

## Ritualize your activities will provide further meaning to them.

## Hold yourself accountable (eg, through checklists, scheduling, a buddy system) will help track and support your goals.

**Step 5: Track, and Refine your WB-IDP and Evaluate Your Success**

## As with any strategic planning effort, it is important to document your progress over time so that you can make adjustments to your plan that are relevant and realistic. We recommend that you engage in this process at the 6- and 12-month milestones at minimum, and as part of this, that you take the wellbeing assessments in step 2 again in order evaluate your progress and make adjustments as needed in the implementation phase.

## While you are following through on the plan above, you can repeat any or all of the steps as needed based on your real-time needs and changing environmental priorities (personal and professional)

## Reflect on when and how you have used your support network – Step 1

## Re-assess your well-being using the WHO-5 – Step 2

## Evaluate your WB-IDP using SWOT– Step 4

## Revise your plan to achieve your goals– Step 3

## If you feel you have accomplished your goal, or are ready or wanting to shift into other areas of your wellbeing, this is an iterative process and steps 1 through 5 can be applied to whichever area you want to spend time with.

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| --- | --- | --- |
| One Year Vision | Describe where you have achieved your vision (evaluate your success) | Describe how you want to continue or revise your plan based on your evaluation |
| “My big picture vision of well-being over the next 12 months was…” |  | In 12 months…In 9 months…In 6 months…In 3 months… |

## This document was developed consulting the framework: Fuhrmann C, et al. myIDP. <https://myidpsciencecareersorg/2011>

## Appendix: Example WB-IDP template for (Year)

Name:

Date:

**Support network/coach(es)**

List the names of your coach, other professional, buddy/peer/friend, family member below. If you lack a support network, then determine a timeline to identify your network and list some names you are considering for your support network.

Name of your coach or other professional:

Name of your buddy:

Name of other support:

**Wellbeing Assessment**

Areas/layers of my wellbeing where I am doing well (and want to maintain):

The areas/layers of my wellbeing that need some attention are . . .

**Wellbeing Vision and Goals**

My vision for my wellbeing this year is . . .

The SMART goals I have identified to help me accomplish my vision are . . .

The 3 Ss activities I have identified to help me accomplish my goals are:

Selfcare Daily

Social Support weekly

Services monthly

**Weekly Timeline and Road Map for the Next 1-3 Months (4-12 Weeks)**

My chart/schedule for my weekly calendar activities to fulfill my goals is (eg, started/in development, being reviewed, in revision) \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ and is located (eg, on my work calendar, on my personal calendar, in my journal, on my phone, on my watch, in my head) \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Implement, Track and Refine your WB-IDP and Evaluate Your Success**

The activities I am performing (frequency) \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ to meet my SMART goals, were met with (barriers, successes) \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_, and I adjusted course if needed by . . .