Episode 12: Dr. Katie Linder

# KL: Katie LinderKL: You’re listening to *Research in Action*: episode twelve.

# [intro music]

# Segment 1:

# KL: Welcome to *Research in Action*, a weekly podcast where you can hear about topics and issues related to research in higher education from experts across a range of disciplines. I’m your host, Dr. Katie Linder, director of research at Oregon State University Ecampus.

On today’s episode, I’m going to talk about strategies for successfully drafting and implementing a five-year plan for your research and writing. As always, I would love to hear from listeners about whether you create multi-year research plans and how you implement them. Please also share any other helpful tips you have for planning your research pipeline. Contact the podcast via Twitter @RIA\_podcast, by emailing riapodcast@oregonstate.edu, or by calling the Research in Action voicemail line at 541-737-1111.

For those of you who have never drafted one, a five-year plan is a structure for thinking forward about the goals that you want to accomplish, the professional development you want to pursue, and the skills you want to acquire over the next five years. I have implemented one five-year plan and I am now embarking on creating another for the next stage of my research career and through the process of drafting these plans I have found that writing down your goals is one of the best way to ensure that they are accomplished but also I really discovered the importance of being flexible when it comes to looking at your five year plan and making changes when needed. I’ll be posting a template that includes many of the things that I’ll be talking about in this episode. You can find those templates in the show notes at ecampus.oregonstate.edu/podcasts.

In this episode I’m going to be talking about three stages of drafting the five year plan. In the first segment I’m going talk about strategies for brainstorming your next five years. In the second segment I’ll talk about drafting the plan with realistic goals and concrete actionable tasks and in the final segment I’ll talk about how you can revisit and re-vise your five year plan as needed. Let’s get started with thinking about, how do you brainstorm your next five years.

For many of us its actually really difficult to think ahead four or five years. There are lots of unknowns, you may not be sure if you’re going to be employed at the same institution or in the same job. Your family status could change significantly if you’re planning to have children or if you’re currently un-partnered and plan to partner or you have aging parents and it’s also unclear where you’ll be living; if you’re going to be moving within the same town that you live now, if you’re going to be purchasing a house or moving somewhere completely different.

It can also be really hard to prioritize what it is that you want to do next and what are the things that you really think are going to help you in your career moving forward. It can be also hard to know what resources will be available to you. If you’re really unsure about your job and where it’s going, you may not know if you’re going to be at a completely new place and with different resources for your research. And also we never know what connections and collaborations will bring and those are the kinds of research projects or book projects or article collaborations or grant collaborations that you just don’t ever quite know what’s going to be around the corner.

Some people may not know even the kinds of things to include in a five year plan. I’m going to go in a little more detail about the range of things and categories that you can include but here some examples from my first five year plan.

I wanted to publish one to two articles per year and I wasn’t tying myself down to what those articles where going to be about but I wanted to make sure that my pipeline of peer-reviewed articles was actively working and that I was pushing articles through that pipeline. I also wanted to start to begin to procure grants and I gave myself sub-goals of getting a five figure grant, a sixe figure grant, and a seven figure grant, so that I can work my way up to some of the larger funding opportunities that were available. I wanted to publish my dis-rotation and I wasn’t quite sure how that was going to look if it was going to be in the form of articles or a book but I wanted to think about that. And I also wanted to actively collaborate with others to enhance my skill of being a collaborator, so that was something I put in my five year plan. Because it was five years and that seemed like a long time, I also wrote that I wanted to write a second book and also I wanted to do more with public speaking, with things like keynotes and workshops at other universities.

So I initially develop this list and this is not exhaustive, those are some of the kinds of things that I included. I initially develop this list by thinking about the larger categories that I wanted to work on and then I added and modify the list as things where accomplished. If you want to think about that strategy for yourself, here are some of the categories to think about.

For your personal life, you might want to think about your family structure and whether or not you plan to add to your family or change your family structure in the next five years. You want to be thinking about things like health and wellness. In the next five years do you want to start something like a yoga or a meditation practice or do you want to run a marathon or something along those lines. You want to think about your housing; are you planning to buy a house or change significantly where you live. You definitely want to have a fun category which could be things like travel; you want to go to Europe. You want to have a financial category, maybe you want to build up your emergency fund in the next five years. I’ve always included an attitudinal category of something I want to be thinking about that maybe, I want to be more positive in my life and how could I make that happen. And also I’ve always included a creativity category and this could be something that’s more of a fun project that you do on the side like creating a new blog or something along those lines.

Then you also of course have your professional category and this is really where your research can be rooted but I also think it’s important to include those other personal items because they can really impact how your research pipeline moves along and the time and energy that you devote to it. So in your professional category you’ll want to think about things like your salary. Are you aiming to get a raise, are you aiming to move up in your job? Maybe you also want to think about your position title, are you going to be going up for a promotion? And you want to think about how that title change and shift your career trajectory in the next five years. You may also want to think about education, maybe you want to go back to school or hone a particular skill and that education can be formal or it can informal. Maybe you just have some professional development that you want to work on for yourself. Of course you’ll have a writing and publication category and I would avoid just saying things like, you want to publish more than you currently do. I would set very specific goals and we’ll get into that more in segment two. And you’ll also want to think about things like self-promotion. Do you want to start consulting or maybe build your social media presence and how might that get put into your five year plan. And then also, you’ll want to think about your reputation. In five years what is it that you want to be known for, do you want to become a recognized expert in a particular area and what might it take to get you there.

Now if going through these categories isn’t getting you the list that you want, a second to potentially start is by looking at your past five years and start by cataloging the kinds of changes that you’ve made personally and professionally. You might want to think about relationships you’ve built or that you invested in, how your family has changed over time, how your wellness or your wealth has changed in the past five years. And professionally what kinds of skills have you developed, what kind of jobs have you had, what kind of education has happened in the last five years? Really this is a way to think about how have you changed over time and what was a reasonable amount of change for you in the last five years that can help you forecast a reasonable amount of change in the next five years.

This kind of reflection can help you see if there are next logical steps for your research or writing. For example, if you want to scale a particular project or bump up your grant writing goals to a higher level, looking at the past five years might help you see that. It’s also a way to think about gaps in your skills and abilities that you might want to work on. So for me I’ve been studying statistics for the last year and a half, since this is an area that I want to strengthen. A third way to approach five-year planning is to journal about some reflective questions or to create a kind of mind map of ideas for yourself. Here’s some examples and I’ll include some of these in the template in the show notes.

Think about how old are you in five years? How old is your partner and your children and your parents? Where do you hope to be living five years from now? How do you want to feel five years from now? Are there significant changes that need to be made in the next five years? Are you generally on the same trajectory that you are now? And what areas of your life and in your research are the most important to develop in the next five years given your age and your other life contexts?

So by thinking about reflecting on your past, that can help you to think about your future. I’m going to take a brief break. In the next segment I’m going to talk more about drafting your plan with realistic goals and concrete actionable tasks; back in a moment.

# Segment 2:

In the last segment I talked about different strategies for brainstorming components of what could be included in a five year plan. One of the things that might be surprising is how many components of your five year plan may not really have to do with your research because it can be a lot about personal categories of your life in other kinds of changes that might be happening in the next five years. But when we think about our research and we think about our lives in a holistic way, we know that all of these things are intermingling with each other and that whether or not we decide to have another child will impact our research pipeline and our trajectory. It’s really important to kind of think about all of those things together.

Once you do have an idea of what you want to accomplish, it’s time to think about what are the kinds of specific task you need to do to help you accomplish each of the goals that you’ve laid out. And this is something that I think especially for items that you’ve maybe never done before can be really challenging and you might want to talk with colleagues who’ve gone through the process of doing some of the goals you’re trying to accomplish to get a better sense of what are the realistic tasks that are included in those things.

I’ll give an example, I talked in the last segment about how in the next five years and really for the last year and a half or so, I wanted learn more about statistics. This is an area that I did not have a lot of training on as a graduate student. I was more qualitatively trained and my first book was qualitative research methods and it wasn’t really until I started to do some of the research that’s closer to what I’m doing now with the research unit here at Ecampus, that I started to need more of a quantitative literacy. And so I’ve kind of take it upon myself to think about, what are the different ways that I can learn about this.

Some of the concrete things that I’ve written down for myself are first of all to read books. I’ve ordered some books on statistics and things like Neil Salkind’s *Statistics for People Who (Think They) Hate Statistics* or a book on SPSS; really kind of practical things that I can think about, what does it mean to use statistics and to use different kinds of software in the work that I’m doing here at the research unit.

I also decided to take a MOOC, a massive open online course on statistics. I took one on R and it was fantastic, it gave me really kind of the practical uses of how to use R which was something that I hadn’t done before. And I also took a course on basic stats so I could get a sense of what are the kinds of things that if I had taken this when I was a grad or in graduate school that I would have learned and those were great. They were a great overview and a nice interactive way for me to practice some things.

I also decided with the school to attend workshops when they were available. For example I have a workshop on SPSS that’s coming up that’s offered through Oregon state universities library. I keep an eye out for those kinds of opportunities.

I also actively seek out mentorship; I talk with colleagues about what it is that I need to know when it comes to applying specific kinds of statistical methods to my work. So I like to talk with colleges a lot about how were they using statistics, what are the kinds of things that they would recommend for me if I want to learn more about certain areas.

And then finally, I’ve really incorporated ways for myself to practice with data and low stakes environments and also where I can talk with my colleagues about choices that I’m making with statistical methods and what they would do in that same situation or recommendations that they would make.

Those are just a few examples of concrete things that I’ve done with a broader goal of learning more about statistics. As you looked at each of the goals that you’ve written down, you’ll want to think about trying to use what is a very kind of a popular method called SMART and it stands for: specific, measurable, attainable, relevant and time bound.

You’ll want to think about goals and action items that are tied to those goals that are pretty specific, as specific as you can make them. You’ll want it to be something that’s measurable, something that you could look at that task and say was I able to complete that. I was able to complete that in a way that’s satisfying to me. And that’s why as I mentioned earlier, you might not want to say something like just publish more than I am right now. Sure you could see if you publish more but how much more do you want to be publishing or how much more in grants do you want to bring in this year? So trying to write down numbers and quantifying and that can be kind of scary because it means that we’re actually reaching for something very concrete but it also can help us to see in the long-run what’s realistic and what’s attainable.

That brings us to the A in smart which is attainable; trying to find things that are not so high in the sky that it’s absolutely going to be impossible for you to do them. You want to have tasks that are relevant to the goal that you created and then also with time-bound that’s really what a five year plan is. It’s thinking about, in what kind of time frame I am going to be able to accomplish these tasks. I would also say you want to have goals and tasks that you have the means, skills and power to accomplish. You want to find things that are not completely dependent on someone else or completely unrealistic. You might not want to say that your goal is to publish your book by a certain deadline. Unless you have a contract with a publisher in hand, you would have to really be dependent on getting that book through a publisher with a contract and all of those things might be a little out of your control. So you might want to choose an action item instead; like you’re going to draft your book proposal, you’re going to research publishing outlets, you’re going to setup conversations with editors and you’re going to send out the proposal by a certain date. Whether or not your proposal gets accepted is to some degree a little bit out of your control because it’s up to the choices of the publishing houses that you send it to.

You also want to make sure that your goals aren’t completely unrealistic because they can just make you feel bad if you’re not accomplishing them. It’s important to know yourself and what you can realistically accomplish. The five year plan is meant to be motivating, it is absolutely not meant to be guilt inducing.

And then also you want to break down your big goals into smaller pieces. For your five year goal, you might want to have something like, “I’m going to develop a research pipeline in a particular area of my field and I want to be known for that area. By the end of this five years, I want to be one of the researchers that people will think about when they think about that field.”

Well your one year goal might be to draft an article based on a project to submit to for publication or expand pilot data collection that would lead you to getting you into that field and maybe you would explore funding the scale of your research.

Well that means in six months you’d need to develop a project idea, pursue collaborators, write up your IRB, those kinds of things in order to gather your pilot data. Well that might mean that within the month, you’d want to download and begin to read articles by people who work within this topic in your field. You might want to locate a professional development opportunity related to this topic so that you can explore it more. Maybe you want to publish a blog post about your interest in this topic and then for this week maybe you need to locate the people who work on this topic within your field just by doing a basic literature search and maybe you’d tweet about your interests in this topic. Everything can get broken down from your big five year goal in your smaller action items that you can do on a very kind of differentiated scale of time.

 Once you have these goals written down with action plans for each, get prepared for things to happen. I found that after writing down my goals I’m always looking for opportunities to accomplish them. I may think “Oh I’ve got this paper that I wrote for a conference and I’m getting ready to set it aside, I’m not sure I want to pursue it.” And then the next week I happen to see a call that has to do with that paper and just because it was on my mind, I thought about it in the context of being able to submit it for the call that came across my email inbox. You’re more likely to see opportunity that might be related to a specific goal and also to throw your hat in the ring for those kinds of opportunities when it’s on your mind.

It’s also true that if other people know your goals, they are more likely to share opportunities or resources with you. The more I collaborate, the more people that reach out to me to collaborate. They see me as someone who enjoys collaborating and who know how to do it effectively and so I often find that one collaboration breeds many. And the same is true for other kinds of publications, once people know that you can publish in a particular area they may reach out to you to contribute in others.

I hope this gives you some ideas for how to break down your larger tasks of your five year goals into more concrete items that can be specific and measurable and it also can be realistic for you and time-bound to your five year plan. I’m going to take another brief break. When I come back I’m going to talk about revisiting and revising your five year plan as necessary, back in a moment.

# Segment 3:

In segments one and two, I talked a little bit about how to brainstorm areas for your five-year plan and then once you’ve brainstorm those areas in your five-year plan, how to break them down into really manageable tasks that you can complete in week long, month long, six months long, or yearlong chunks to really move you forward in that five-year plan. In this last segment I want to talk about how you can re-visit and re-vise your five year plan as needed and this is something that I think is really important to discuss because a lot of people I think are scared-off of creating something like a five year plan because they think that once its written its set in stone. And I think that is really not the case because you’re never sure what’s coming around the vend and you’re also not sure how quickly something could be accomplished and you’ll need to tweak and change your five year plan as your plans change or as you accomplish certain goals earlier than you thought.

First I wanted to say that when you write your goals down, when you have your action plans for each one; you’ll want to schedule a time to check-in with these goals on a regular basis. You might want to write that check-in into your calendar and also you’ll want to think about how regularly do you want to be thinking about these items and it could be something you want to do maybe every month, or every few months, every quarter or every six months, just a couple of times a year.

You’ll want to write check boxes by your goals and action items so you can check them off when they’re accomplished and that will also help you to really be thinking about, are these action items something that I really can check-off that I’ll know when it’s done and that makes you kind of hold you accountable to making sure that it’s something that is measurable to you.

You’ll also want to focus on the one year goals first since they’re probably more manageable and can be broken down into tasks for each week or month. As you go through, you may not look at your five-year plan in total, when you regularly check-in you might just want to look at what you had planned for the coming year.

You’ll also want to put your goal somewhere that you can see them and that they’re easily assessable to you. Consider writing them on a whiteboard or putting them on sticky notes that you carry with you or create a digital document that you can refer to or even keep a picture of these goals on your phone. Somewhere where you can pull it up and be reminded of, what are the kinds of things that I’m wanting to do. And this also can help you if you get an opportunity maybe, you’re at a conference and you’re networking with colleagues and they offer to have come in and be a collaborator on a new project. You could kind of look back and say okay, “What were my larger goals for the next five years? Does this fit within those goals or is this really going to detract from what I’m trying to accomplish?”

You also want to try to do something that moves at least one of your goals forward at least once per week. So you’ll want to think about these tasks and what they are. Think about maybe on a monthly basis how you want to break things down but also try to write them into your calendar so that they get prioritized. If you aren’t doing these things on a regular basis that means that maybe you should re-visit your goals to make sure they really are what you want to do and not just what you think you want to do. For example, you say in the next five years you want to knit a sweater but then you always find yourself procrastinating from actually learning how to knit a sweater. Or for every time you try to knit the sweater you get really frustrated. It may mean that you’re just a knitter and you need to give that piece up. Or running a marathon, maybe you re-visit that goal after a year or two and realize it’s just not as important to you as you thought and half a marathon is really going to do the trick for you. So being willing to make those changes and look at what is it that you’re actually accomplishing as you move forward, can be really helpful in terms of prioritizing what you want to do in the future.

It’s also really helpful to instill habits that help you accomplish your goals. So signing up for a class or signing up for a work shop, joining a reading group or meeting up with a writing group on a regularly basis. It could also be that you schedule conference presentations to increase your networking if that was something you wanted to work on. Or you just kind of give yourself deadlines for things. Conference presentations are a great way to do that, to move research forward. One other thing that could help you is think about something that you do every day like tweeting out what you’re working on that is keeping you really on track with your goals. For some people that’s just tweeting out a word count of the writing that you accomplished for that day. The other thing that’s maybe the most important piece is that you can change your goals if you need to.

If you’ve never written a five-year plan and you’ve not really worked out your goals and your action items in this way, you may find that you initially write it in a way that’s not realistic for you. Maybe its overly ambitious, maybe it’s under ambitious and you want to be changing it up as you go along. You can always go back and look at your goals and your action items and make changes to make them more realistic. You can add to them because of accomplishments that you’ve had, you can make them more detailed if you need to, you can move them to a different place in your five year plan and you can also just adjust your expectations for yourself and think about what is truly something that you want to do, what are the goals you want to accomplish and what are the things that you know about yourself that are going to get you there.

I would love to hear from listeners more about whether or not you use five year plans and how you use them. This is certainly been something that’s been very useful to me, to think about what are the things that I really want to work toward but I know are going to take more time than just a year or a year or two? And often times those are related to things like our larger projects or our pipelines for grants, for projects that are going to lead to multiple publications, multiple articles, perhaps even multiple books or even just for projects that we know are going to take a long time, that data collection could take several years and we need to be thinking about now, what it is that we want to be collecting so that five years from now, we’re ready to release the results from our projects.

I hope that this episode has been helpful for you to think about, what are the different things that you can brainstorm to put on your five year plan, how you can make those goals actionable through very clear action items, and then also how you can re-visit and re-vise your five year plan as needed.

Thanks to you listeners for joining us for this week’s episode of research in action. Please connect with us on twitter or through the website or our voicemail line. If you’re trying a five-year plan or a three-year plan or a one-year plan or a this week plan, we’d love to hear about it. What’s worked for you and what have you done when a wrench has been thrown in your plans, let us know? I’m Katie Linder and we’ll be back next week with a new episode.

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