

Red/ blue text provides directions for using this template. Please read this document before deleting the red and blue text.

Primary Mentor Name _____
Trainee Name _____
Secondary Mentors (if applicable) _____

Goals and Planning Worksheet – Mentors

Year: 2021-2022

Trainee Career Goals: Copy and paste from the trainee goals and planning sheet

Chosen Career Path

- I. Most interesting career path
- II. Other interesting career paths (if any)

Please complete Section 1 to 4, before looking at your trainee's goals and planning sheet

Section 1: Accomplishments (from the previous timeframe)

Identify the trainee's strengths or contributions that you valued, e.g., I appreciate your leadership on lab cleaning activities and helping me complete lab safety compliance requirements.

Tips for facilitating the meeting: Please share at least one or two accomplishments before moving to a discussion on goals.

Section 2: Research Goals (goals that can be accomplished by October 2022)

a) Research (goals related to lab work)

Mentors should consider the second-year research plan for the BPRI and design goals that align with the trainee's roles in the BPRI.

Tips for facilitating the meeting: Help trainees to categorize goals into high, medium, and low priority.

b) Dissertation research goals (goals related to dissertation research)

Mentors should prioritize the trainee's ideas related to the lab's overall research goals or encourage the trainee to identify new research problems following his/her personal research interests.

Encourage trainees to develop their degree plans. Help them to identify the courses that help their research interests as well as boost interdisciplinary knowledge.

c) Interdisciplinary research goals (goals related to exploring another interesting discipline)

Explain steps that you planned to assist trainees identify related fields, tools, or courses from other disciplines. Explain how you plan to assist lab swap activities (identifying a lab, or an expert from the BPRI team).

d) Papers and Publications goals (goals related to publishing research work)

Explain the anticipated publication plan based on the trainee's research/BPRI research. Clarify the trainee's authorship status (i.e., papers for which trainees will be co-authors and expected contribution).

Share information on conferences so that trainees can prepare abstracts to present their research work as talks/posters.

Section 3: Professional goals (goals that can be accomplished by October 2022)

Please identify at least one professional goal for your trainee.

a) Teaching goals

Describe the teaching requirements for a Ph.D. student (or possible opportunities to teach a class or assist in developing class materials). Make sure that trainees understand the expectations for a Teaching Assistant and that they have acquired the required knowledge to teach courses.

b) Presentation goals

Describe expectations about communication of research. Share information on conferences that are related to the trainee's research or career interest.

c) Fellowships and grants goals

Share information on fellowships and grants opportunities (e.g., travel grants). Don't assume that trainees are aware of opportunities that are available at your department, share everything. Consider some seed grants opportunities for Ph.D. candidates or postdoctoral trainees.

d) Project management, leadership, conflict management skills goals

Describe how you will help trainees to gain these skills or the level you expect trainees to reach regarding these skills. Which opportunities are available at your university to develop these skills?

e) Career preparation goals

Describe resources that you will provide to develop the required skills and knowledge to meet the trainee's career goals. Ensure that trainees have identified a career path (or at least that the trainee has started to think about long-term goals). Share information on any networking opportunities. Make sure trainees identify scientific societies or other opportunities that will help them choose a career path.

Section 4: Feedback to the trainee (consider the overall process of communication between mentors and trainees)

a) Strengths

Explain how you appreciate your trainee's honest feedback on your mentoring

Share your overall feedback.

Identify if the trainee is at high risk of burnout or high level of stress in managing tasks, and share some feedback on work/life balance.

b) Weaknesses

Confirm that it is safe to make mistakes, and emphasize the need for learning from mistakes.

REMEMBER TO DISCUSS

Plans for IDP review meetings (frequency of meetings, progress monitoring timeline, and flexibility of this plan)

Some questions that are helpful to prepare for the IDP meeting (adapted from Vincent et al., 2015)

- Is someone in the midst of a technically challenging set of experiments?
- Do they need additional outside expertise?
- Can you help them find a collaborator or other resources to fill the gap?
- Do they need encouragement to persist or permission to move on?
- If someone is considering a job in industry or teaching, do they have all the information they need to decide if this career direction is a good fit? Are they concerned about your opinion? For example, might they fear that if they admit they're not aiming for an academic career you will reduce your support for them?
- Do they have the qualifications that they need to succeed in their chosen career?
- Is their plan to achieve those qualifications realistically, or is it time to adjust their goals?