Personal/Interpersonal

1) How is each party doing with respect to **work/life balance**?
2) Is there anything going on within the department or school that should be shared?
3) Is there anything going on in your outside life that needs to be shared?
4) Has anything changed in terms of the **key characteristics** the student is looking for in a mentor or that the mentor can offer?

Intro to professional opportunities

1) What are the student's **long term/career goals now**? Have they changed? What caused this change?
2) Given these goals, have new **fits/gaps** emerged with respect to the advisor's skills and the student's needs that should be discussed?
3) Taking into account the aforementioned fits/gaps, what is the **optimal mentoring structure** for the student?
   - Have you discussed what the optimal set of mentors and champions/sponsors* are?
   - Are there mentors at other universities or in other departments who might be useful to connect the advisee to?
   - Are there opportunities for short-term or project-based mentoring to occur that might benefit the student?
   - Are there (potentially more senior) members of the research group who should take on certain, specific mentoring responsibilities (e.g., an advanced doctoral student teaching a certain software program)?
   - What steps will you take to build that team this year?
4) Are there particular **skills** that will be important for the student to develop this year?
   - Where does the student have more/less experience: research, teaching, publishing, grant writing, presenting, project management?
   - What are the top three goals for the student's development for this year with respect to skills?
5) What types of **professional opportunities** should be prioritized for the student this year?
   - Participating in research
   - Publishing
   - Grant writing
   - Reviewing
   - Teaching
   - Research presentations
6) What **projects** are important for the student to focus on for the coming year?
   - Does each party have a clear sense of priorities {e.g., the main vs. spin-off project(s)} for themselves and for the other party so that:
   Both sides are clear on where all the opportunities for fruitful collaboration lie.
   Both sides can have a sense of the balance of priorities of the other party.
   - Are respective roles for each project clear?
7) Are there **publications** you will be working on this year?

(Developed by Hunter Gehlbach – Spring, 2019)

- Have you discussed how (e.g., what skills they will need) and when students are likely to be ready to shift from helping out on a project to being a supporting author to being a first author?
- In general, what are the expectations that each of you have regarding who gets to be first author, an author, or senior author*?
- Are there opportunities for first-author/senior-author collaborations?
- Are there opportunities for the advisor to give the student a chance to do peer reviews for conferences and/or journals?
- Are there expectations regarding how many authorships students are expected to have each year (and which ones they'll be authors on)?
- For specific projects, have you had *a priori* conversations about how authorship will happen (possibly pending how the nature of the results) so that research project participants can calibrate their efforts accordingly?

8) What is your plan for completing any required **milestones** for this year?
- Have you discussed how projects will fit together into a trajectory… ideally one that will help facilitate multiple goals for the student? (e.g., a 1st or 2nd year research project becomes a conference presentation and later turns into a publication)
- Are there forthcoming opportunities for achieving economies of scale by having single projects serve multiple ends (e.g., a milestone, a dissertation proposal, a grant proposal, an article, and an op-ed or practitioner piece)?

9) What are three opportunities the mentor could take advantage of to **promote the advisee/advisee's career** in the coming year?
- Are there opportunities for public praise (with or without the mentee present) in front of key people?
- Can interesting projects (that the mentor does not want to pursue) be handed off to the mentee?
- Can the advisee take on any/some/more conference presentations?
- Are there key introductions in the field that the mentor can make?
- Are there awards/fellowships/opportunities to nominate the student for?

10) How well is the student prepared for the **job market** given where they are in the program?
- How well does each party feel as though the student's professional dossier is: Research statement or cover letter; CV or resume; teaching portfolio; etc.
- How well can the student articulate the story of why their research is important? (i.e., their "elevator pitch")
- What are three concrete steps that can be taken to improve the student's portfolio?

Working style/logistics/meeting schedule
1) Are there any changes in how will you **communicate** this year?
2) Are there any changes in the **norms around meetings** for the coming year?
- Has anybody in the research group visited other groups to bring back useful practices?
- Is there an opportunity to have a joint lab meeting to catalyze cross-fertilization of ideas and/or lab meeting practices?

- What is one thing that you can do to improve meetings/communications in the coming year?
3) What are **best practices** of each party that are appreciated (and should be continued and/or augmented) by the other?
4) Are there any changes or improvements in how should **feedback** occur?
5) Has anything changed regarding your expectations around the **quantity and timing of work**?

Monitoring the mentorship
1) Has the mentoring relationship evolved in appropriate ways given the student's growing skills?
2) How well is the mentor doing in striking the balance required of being a "warm-demander"?
3) What does each party view as the strengths/areas to work on for each other? What strategies will help each person build on strengths and address weaknesses?
1) What are three customizations of the mentor's usual practices that will likely prove useful for this advisee?

* In a number of fields, the person who set the context for the study (e.g., getting the grant that funded the project), but did not necessarily do a lot of the work of the study, is listed in the last serial position as the "senior" author. This is a particularly good system when it can allow students to get substantial credit as first author and faculty members can get credit simultaneously for the academic idea and for facilitating students' careers.

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