

# Mentoring Agreement

*This document provides an adaptable structure and set of topics to discuss when setting up a mentoring relationship. The members of a mentoring team (both mentors and mentees alike) can review their responses to these questions and work together to establish guidelines and expectations for their mentoring relationship. In the case of dual mentorship or co-advised students, both mentors should collaborate with the mentee in the development of this agreement.*

*The goals of this document are ultimately to support the mentee to succeed in their research program, and to help the mentee feel supported as they make progress toward their academic and professional goals. Expectations are that the agreement will be revisited annually, and may be modified as needed in collaboration between the mentor(s) and mentee. The process of discussing and revisiting the topics in this document holds the most promise for impact on a positive mentoring experience.*

## **Mentoring Team Names:**

## **Shared Goals & Vision**

- List the goals of this working relationship.
- What does each member of the mentoring team hope to get out of working together?
- What skills and experiences will the mentee gain, and how will that learning serve their larger academic and professional goals?

*Research project goals:*

*Mentee's personal/professional goals:*

*Mentors' personal/professional goals:*

*Shared vision of success for this mentoring relationship and/or project:*

## **Strategies for Achieving Collective Goals**

- What does each person on the mentoring team need to do to meet the identified goals?  
(Some examples: What kinds of materials will the mentee be able to ask for feedback on? Will the mentor commit to strengthening specific mentor skills to meet some of the named goals?)

*Mentors' role/tasks:*

*Mentee's role/tasks:*

## **Meeting Practices**

In this section, discuss all things related to meeting practices, including: the frequency, duration, format and platform for meetings, what meetings will be used for, who will schedule the meetings, who will set meeting agendas, etc.

## **Meeting Preparation**

In this section, discuss all things related to meeting preparation. What will the mentee do to prepare for meetings? What will the mentor do to prepare for meetings?

## **Communication Etiquette**

In this section, work together to establish preferred modes of contact, timeframe for responsiveness, when it's appropriate to reach out, etc.

## **Authorship (in shared research settings)**

In this section, discuss policies related to authorship:

- What are the expectations for gaining authorship credit?
- How do these expectations and policies differ for undergraduate interns, graduate student researchers, postdocs, and other members of the team?
- What is the difference between first, second and last authorship?
- Can a trainee take data with them when they leave the lab/project?
- Who has access to the data and where will the data/code be stored?

## **Research Etiquette**

In this section, the mentor(s) and mentee can discuss together the expectations for doing research, particularly in a lab or field setting.

- What are expectations for when each member of the team will be available, such as being present in the lab/ in the field?
- What are policies or expectations around taking time off, taking sick leave, or observing holidays?
- What are key expectations for interactions in the lab/field?

## **Unplanned Issues**

- How will the mentor(s) and mentee address unplanned issues that come up?  
(Some examples: if the mentee gets stuck while working on a project, what are some steps the team can take? If a conflict comes up in the relationship, to whom should members of the mentoring relationship turn for resources and support?)

## **Summer Research Activities**

- What kinds of support will be offered during the summer (e.g. financial, computational, space, equipment)?
- How will the mentee and mentor communicate over the summer and how often?
- What are the mentees research goals and mentors research expectations over the summer?

## **Confidentiality Concerns**

Ensure each person is on the same page in terms of keeping particular discussions in confidence. If there are topics which either of you feel are off-limits for discussion, those can be named.