



Advanced Research Institute
in mental health and aging

PREPSHEETS FOR MENTORING DISCUSSIONS

The following documents were developed by Micaela Tucker and Martha Bruce as part of the Faculty Mentoring Program at the Dartmouth Institute (TDI) for Health Policy and Clinical Practice. These guides offer suggestions for both mentors and mentees in preparing for their initial as well as ongoing meetings. They may also be helpful to Scholars working with home-based mentors.

MENTORING ENGAGEMENT DISCUSSION PREPSHEET

Developed by Micaela Tucker and Martha Bruce for The Dartmouth Institute

Mentee:

Date of discussion: _____

Mentor:

Date of next discussion: _____

This guide is appropriate for your initial meeting(s) with a new mentee. It is meant to help you in articulating your needs, as well as considering whether and how to engage as their mentor.

Mentor discussion questions:

Things to cover if you have not already:

- a. Why do you want to invest in this relationship? How much time and effort do you have to offer?
- b. How often will the two of you meet? In person, by phone, by email? What works for you? Will the Mentee agree to be responsible for scheduling meetings and reminders?
- c. Any ground rules that you'd like to set on communication (email, phone, text, in person, hallway conversations)? To what extent will your conversations be confidential? (What is your expectation and what is the mentee's expectation?)
- d. How will the mentee integrate work with other mentors, coaches, and consultants into your mentoring and development work with this mentee?
- e. How much of this effort do you expect will be your responsibility and how much do you expect will be the mentee's?

Initial Promotion assessment:

- a. How many years until promotion? Is the mentee on track with promotion timetable?
- b. What, if any, gaps are there in the mentee's CV? (e.g. unique contributions to science, grants, publications, presentations, mentoring others, teaching, reputation building, etc). And are you well-suited to help the mentee address (any of) those challenges?

Goals assessment:

- a. Does the prospective mentee have identified career goals? Are there incremental goals for the next 3-6 months, one-year, and five-year time frame?
- b. Are you able and willing to assist in providing resources or connections needed to accomplish what the mentee is setting out to do?

Mentoring principles:

Mentors: Curiosity • Commitment • Generosity • Sponsorship • Openness • Responsiveness

Mentees: Purposeful • Prepared • Realistic • Open • Engaged • Learning to Mentor

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Mentee:

Date of discussion: _____

Mentor:

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This guide is appropriate for your initial meeting(s) with a new mentor. It is meant to help you articulate your needs and consider whether and how to engage them as your mentor.

Mentee discussion questions:

Things to cover if you have not already:

- a. Why do you want to invest in this relationship? How much time do you expect to devote to working with this mentor?
- b. How often will you meet? (Mentees ideally take responsibility for scheduling meetings, sending notices, and reminders)
- c. Any ground rules that you'd like to set on communication (email, phone, text, in person, hallway conversations)? Do you expect these conversations be confidential?
- d. Who are the other mentors, peer mentors, coaches, and consultants contributing to your development work? Would it be helpful for any of these people to be in touch with each other? Who are other faculty members you should be talking to?

Initial Promotion assessment:

- a. How many years until your promotion? Are you on track with the promotion timetable?
- b. Do you have a good sense of the performance expectations for someone of your rank and field? (e.g number of papers and types of journals where you should be publishing, conferences, organizations, and academic service you should be a part of, post-docs)?
- c. What are gaps in your experience or achievement and contribution to science that you'd like to fill? Which are the specific gaps for which you expect this mentor's help?

Goals assessment:

- a. What are your identified career goals? What are your goals for the next 3-6 months, one-year, and five-year time frame?
- b. What resources or connections do you need to accomplish what you are setting out to do and how do you expect this mentor to help?
- c. What mentoring and development needs do you have that are not being met?

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Date of discussion: _____

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Mentor discussion questions:

Using the CV as a guide for reviewing progress and to identify potential gaps with regard to quality and quantity, discuss strategies for addressing those gaps.

Planning:

a. What's the current status of the mentee towards the goals set at the last meeting?

Does the mentee want to shift goals?

b. Looking at long terms goals, has the mentee's vision for the future changed?

c. What goals are on the mentee's timeline for the next 3-6 months, one-year, and five-year time frame? Does the mentee have a timeline written out to share?

d. Does the mentee have a good sense of what's achievable, probable obstacles, needed resources or connections? What resources or opportunities are you, as a mentor, able to identify or offer?

e. Is the mentee realistically identifying weaknesses and anticipating how to overcome them through training, collaboration, or assistance?

f. Are there mentoring and development needs that are not being met? (e.g departmental information, connections, process knowledge, training, etc.)

Promotion progress check-in:

a. How many years until promotion? Where does that fit in the promotion timetable?

b. Does the mentee have a good sense of the performance expectations for someone of similar rank and field? (e.g., number of papers and types of journals for getting published, conferences, organizations, and academic service to be a part of, post-docs)?

c. What, if any, gaps are there in the mentee's CV? a. Consider: evidence of unique contributions to science, NIH/PCORI grants, publications, presentations, study sections, mentoring others, teaching, visiting professorships, roles in national organizations, Dartmouth leadership or service.

b. Does the mentee's CV represent funding and publications that show adequate independence from primary mentor or senior faculty sponsor?

c. What is the plan to address identified gaps?

d. What goals and opportunities are there to increase regional/national/international reputation and recognition?

e. Is the mentee actively teaching, creating, or contributing to the curriculum?

f. Is the mentee serving as a mentor?

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Mentor:

Date of next discussion: _____

Mentee discussion questions and preparation:

Things to bring to the meeting:

- a. Updated CV.
- b. Timeline for upcoming grant applications, upcoming manuscript, or abstract submission.
- c. Updated list of current courses, student mentees, or other activities.

Planning:

- a. Looking at the long terms goals you have set, what does success look like to you?
- b. What's the outcome you want? What do you want to be different in five years?
- c. What are your goals for the next 3-6 months, one-year, and five-year time frame?
- d. Do you feel confident about your timeline? What additional support do you need to achieve your goals in the time you've allowed?
- e. How will you know whether each goal is achievable or needs revising?
- f. What obstacles are you facing or do you anticipate? What options have you considered?
- g. What resources or connections do you need to accomplish what you are setting out to do in the next 3-6 months, year, 5 years?
- h. What mentoring and development needs do you have that are not being met? (e.g departmental information, connections, process knowledge, training, etc.)

Promotion check-in:

- a. How many years until your promotion? Where does that fit in the promotion timetable?
- b. Do you have a good sense of the performance expectations for someone of your rank and field? (e.g., number of papers and types of journals where you should be publishing, conferences, organizations, and academic service you should be a part of, post-docs)?
- c. What, if any, gaps are there in your CV? a. Consider: evidence of unique contributions to science, NIH/PCORI grants, publications, presentations, study sections, mentoring others, teaching, visiting professorships, roles in national organizations, Dartmouth leadership or service.
- b. Does your CV represent funding and publications that show adequate independence from your primary mentor or senior faculty sponsor?
- c. What is the plan to address identified gaps?
- g. What goals and opportunities are there to increase regional/national/international reputation and recognition?
- h. What leadership goals and opportunities do you see for increasing your experience?
- d. Are you actively teaching, creating, or contributing to the curriculum?
- e. Who are you mentoring? What are you doing to increase the quantity and quality of your mentoring?

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