**Mentor-Mentee Compact**

**Instructions:** Mentors and scholars will complete this compact, designed to help facilitate the discussion of expectations and goals. We also encourage you to refer to the program expectations as you work through this form. **Step 1)** The mentor and scholar should electronically fill out their respective columns **Step 2)** Set up a meeting with your scholar to discuss the compact **Step 3)** Work together to create a final compact **Step 4)** Mentor and Scholar both sign the compact

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| **Scholar Name:** | **Mentor Name:** |
| **Goals of Scholar** | **Goals of Mentor** |
| **Describe your goals for this relationship.**  Examples: develop new research skills, receive training/career advice, author publications, network with other researchers, learn how to handle school-life-work balance, become a more confident speaker, acquire preliminary data for a new project, be recommended for future training or employment positions (see SMART goals on final page). | **Describe your goals for this relationship.** |
| **Steps to achieving goals as stated above** | **Steps to achieving goals as stated above** |
| Examples: meet regularly, collaborate on research projects, submit manuscripts/grant proposals, network with other trainees, test out strategies for increasing work efficiency, get practice presenting to different audiences, meet with researchers in different work settings, etc. |  |
| **Expectations of Scholar | *Education and Training*** | **Expectations of Mentor | *Education and Training*** |
| **Describe any additional education and training you need for your research development.**  Examples: conferences, Grand Rounds, protocol-specific trainings, seminars, lab meetings, etc. | **Describe how you will assist the scholar with obtaining additional education and training for research development outside of the CTSI Program.** |
| **Expectations of Scholar | *Research*** | **Expectations of Mentor | *Research*** |
| **Describe your specific research expectations.**  Focus on the following:   * Interactions with your mentor and your research team, including the nature and frequency of meetings * Major research milestones, such as protocol development and approval, completion of specific experiments or analyses, presentations and abstracts (including plans for CTSI Poster Session), plans for a future independent project * Support you will need to complete your project (time, materials, software, access to equipment, consultation with experts in methodology or statistics) * Dissemination plan (travel to present findings, CTSI Poster Session, community forums) * Authorship rules for any academic publications produced from projects worked on jointly between mentor and mentee | **Describe your goals for this relationship. Relate your goals to your research career.**  Focus on the following:   * Interactions with the scholar and the research team, including the nature and frequency of meetings. * Major research milestones, such as protocol development and approval, completion of specific experiments or analyses, presentations and abstracts (including plans for CTSI Poster Session), plans for a future independent project, including the support you will provide * Dissemination plan (Scholar’s travel to present findings, CTSI Poster Session, community forums) * Authorship rules for any academic publications produced from projects worked on jointly between mentor and mentee |
| **Expectations of Scholar | *Academic Skills*** | **Expectations of Mentor | *Academic Skills*** |
| **Describe the academic skills you need to develop.** Examples: ethics in research, critical thinking, evaluating the scientific literature, interpreting results, writing an abstract or paper, presenting results, leadership | **Describe how you will assist the scholar with developing academic skills.**  Examples: ethics in research, critical thinking, evaluating the scientific literature, interpreting results, writing an abstract or paper, presenting results, leadership |
| **Expectations of Scholar | *Career Development*** | **Expectations of Mentor | *Career Development*** |
| **What career path options are you considering?**  **What might help advance you to those paths?**  Examples: graduate school, health care career, research career in academia/private industry/other setting)? | **Describe how you will support the scholar's career development, exploration, and preparation.**  Examples: graduate school, health care career, research career in academia/private industry/other setting, transition to research independence)? |
| **Scholar Communication/Norms** | **Mentor Communications/Norms** |
| **What questions do you have about the norms for this research group or setting (i.e. communication methods, addressing concerns, requesting meetings)?** | **What norms are specific to your research group or setting (i.e. communication methods, addressing concerns, requesting meetings)?** |
| **Relationship Quality and Effectiveness** | **Relationship Quality and Effectiveness** |
| **How will you assess and maintain the effectiveness of your mentoring relationship?**  Examples:bi-annual review of our meeting minutes, goals, accomplishments; informal check-ins on our mentoring interactions; mutual commitment to give each other honest feedback and to adapt our behaviors and realign our expectations as needed) | **How will you assess and maintain the effectiveness of your mentoring relationship?**  Examples:bi-annual review of our meeting minutes, goals, accomplishments; informal check-ins on our mentoring interactions; mutual commitment to give each other honest feedback and to adapt our behaviors and realign our expectations as needed) |
| **Mentorship Duration and Closure** | **Mentorship Duration and Closure** |
| **How will you know when the mentoring relationship has served its purpose and should come to a close?** Consider the following:   * Are there defined “transition points” (e.g., a research niche is developed, a fellowship is completed, a grant period is ending, independence milestones are met)? * Is there a process to cordially change mentorship (switch to a new mentor, add a co-mentor) if our goals change, the relationship is not productive, etc.? * How will we wrap up projects and interact in the future? | **How will you know when the mentoring relationship has served its purpose and should come to a close?** Consider the following:   * Are there defined “transition points” (e.g., a research niche is developed, a fellowship is completed, a grant period is ending, independence milestones are met)? * Is there a process to cordially change mentorship (switch to a new mentor, add a co-mentor) if goals change, the relationship is not productive, etc.? * How will we wrap up projects and interact in the future? |
|  | By signing this document mentors are also agreeing to 1) attend scholar’s 6, 12 and 24 month review meetings and 2) cover scholar research funds |
| **Scholar Signature and Date** | **Mentor Signature and Date** |

**What are SMART goals?**

**Specific:**The goal statement should be concrete and action-oriented. What specifically are you trying to accomplish?  
  
**Measurable:**How will I know when I have achieved the goal? How will I track and measure progress? How is success defined?  
  
**Achievable:**The goal should require work, but be attainable. Is the goal too big or too small?  
  
**Realistic:**Do I have the ability and commitment to reach the goal? What additional resources of time, money, or capability will be needed to reach the goal?  
  
**Timely:**There should be a specific time-frame for achieving the goal.