

UCSF Mentor Development Program (MDP)

Mentoring Checklist

This is a checklist of activities to guide both the lead mentor and mentee following a mutual agreement to formalize the lead mentor and mentee relationship.

First Visit	
Mentor	Mentee
1. When the appointment is made, forward an individual development plan (IDP) to be returned at least 2 weeks prior to your scheduled meeting	1. Set up initial one hour meeting date and time 2. Prior to the meeting review accomplishments of your mentor, i.e. recent publications via pub med, NIH crisp database, grants etc. Obtain a copy of your mentors CV 3. Review: A Faculty Handbook for Success Advancement & Promotion at UCSF .
Before the first Meeting: 1. Review mentee documents, i.e. IDP, current CV, and NIH biosketch	At least 2 weeks before the first Meeting: 1. Send your Lead Mentor <ul style="list-style-type: none"> o your most recent updated CV in UCSF format (Faculty Handbook) o NIH biosketch o completed IDP o Career Mentor name
During the First meeting: 1. Detailed discussion of IDP and other materials 2. Your research and mentee overlap 3. Discuss Mentoring Team: <ul style="list-style-type: none"> o Identify co-Scientific mentors 1-2 co-mentors from different disciplines; at least one mentor from a multidisciplinary team if the lead mentor is not 4. Set frequency of meeting and length <ul style="list-style-type: none"> o Define frequency of meetings with the mentoring team: <ul style="list-style-type: none"> ▪ Co-mentor Scientific mentor q 1- 3months? ▪ Whole mentoring team q 6 months? 1 hour o Discuss general concepts of f/u meetings o Define intervals for updating IDP, i.e. q 6 months or q yearly? 5. Set next meeting time, date and location	During the First meeting: 1. Discuss your areas of interest, goals, plans for meeting goals, develop an action plan using the IDP to focus your discussion with your lead mentor 2. Bring a list of potential co-mentors for your multidisciplinary mentor team 3. Discuss series 4. Agree on frequency of meetings and a series of follow-up meetings dates and times
After the first meeting: 1. Review brief summary prepared by mentee, return comments and encourage mentee to share with co-mentors	After the first meeting: 1. Write a brief summary to capture action items and send to your lead mentor 2. Make sure to follow up on any meeting items 3. Set up a regular schedule to revisit your IDP and update accordingly 4. Update your CV quarterly

Follow-up Meeting(s)

Mentor	Mentee
<p>Before the Meeting:</p> <ol style="list-style-type: none">1. Review mentee updated information	<p>Before the Meeting:</p> <ol style="list-style-type: none">1. Forward specific agenda items and pertinent materials you may want feedback on during your meeting (project ideas, proposals, abstract or manuscript drafts)2. Update CV: Highlighting any pertinent changes3. Update IDP: Highlighting any pertinent changes4. Networking: Identify professional meetings, organizations: attending, paying attention to abstract submissions and networking opportunities5. Review series & promotion—questions? Are you on track?
<p>During the meeting:</p> <ol style="list-style-type: none">1. Review IDP and CV<ul style="list-style-type: none">o Specific attention to progression or lack thereof,o Identify potential strategies2. Discuss series and promotion and timeline with specific activities3. Discuss networking and other issues.4. Discuss and set up meeting with co-mentors and f/u meetings with lead mentor	<p>During the meeting:</p> <ol style="list-style-type: none">1. Revisit your areas of interest, goals, plans for meeting goals, develop an action plan using the IDP to focus your discussion with your lead mentor<ul style="list-style-type: none">o Discuss any concerns or problems, accomplishmentso Discuss pending abstract submissions, attending meetings, joining professional organizations etc. Nationally, regionally, locally?o Discuss series and promotion questions2. Set up a follow-up meeting date and time, duration of meeting3. Discuss and set up meeting with co-mentors and f/u meetings with lead mentor
<p>After the meeting:</p> <ol style="list-style-type: none">1. Review brief summary prepared by mentee, return comments and encourage mentee to share with co-mentors	<p>After the meeting:</p> <ol style="list-style-type: none">1. Review brief summary prepared by mentee, return comments and encourage mentee to share with co-mentors