# Planning your mentoring relationship

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This guide is designed to help you get the most out of your mentoring relationship by giving you advice on:

1. How to establish mentoring expectations with your mentor
2. How to plan/conduct effective mentorship meetings
3. Creating an action plan.
4. Implement your plan!

Conducting your mentorship relationships with a structured plan can help many mentees achieve their goals within the program and develop crucial skills to succeed. A structured plan will also help your mentor provide meaningful guidance, and help you keep track of your progress.

## Alternative ways to get the most out of mentoring: using an IDP

Another way to plan for mentoring, is by using an Individual Development Plan (IDP).

You can use this tool by creating a free account at: <http://myidp.sciencecareers.org>.

This tool provides many great resources you may find useful when trying to structure your mentoring relationship such as:

1. Self-assessments about your skills, interests and values
2. Career path recommendations based on your self-assessments
3. Career exploration guidelines
4. How to conduct informational interviews and expand your network
5. Developing SMART goals to help you develop skills and structure your mentoring relationship(s).

[Watch a video about completing your own IDP](https://youtu.be/OoZKnm2er_U).

We recommend that you use this document or an IDP to structure your mentoring relationship

# Step 1. Establishing Mentoring Expectations

Once you have been matched with a mentor, you need to set up an initial meeting. During this meeting, it is important to establish a set of mutually agreed expectations of how the mentoring relationship will be conducted.

These include:

1. **Communication method**: Establish a reliable method of communication to conduct meetings and manage correspondence (Temerty Medicine Connect, email, phone, in-person, etc.)
2. **Meeting frequency**: Schedule regular mentorship meetings on a timeline that works for both parties and include them in a calendar (it is recommended that these meetings happen at least bi-monthly). At the end of each mentorship meeting, both parties should be aware of the next scheduled meeting.

# Step 2. Planning and Conducting Effective Mentorship Meetings for Mentees

Time with your mentor is valuable and you need to get the most of it.

To do so, you must prepare for your meetings in advance with a set agenda and goals in mind!

Mentorship Meetings best practices

1. Lead the meeting with an agenda
2. Send a reminder email to your mentor approximately 1 week before your meeting
3. Provide your mentor with a meeting agenda at least 24 hours before the meeting with discussion points and questions (see pages 3-4 for examples of questions you could include)
4. Take notes during the meeting
5. Summarize and confirm the key points and action items with your mentor at the end of the meeting
6. Record the date of your next meeting on your agenda and in your calendar
7. Within 48 hours after your meeting, summarize your meeting notes and mentor suggestions into your Action Plan (see next step below) and send them via email to your mentor to get their feedback.
8. Build on action items for your next meeting

# Step 3. Creating an Action Plan

It is important that you engage in self-reflection to determine what your mentorship goals are.

Your goals can range from academic, to career, to general skills, to wellness and beyond. If you are having trouble getting started on your self-reflection exercise, access the self-assessment tool in the My IDP link on page 1.

Create your action plan by documenting goals and outlining action items with timelines. You can seek the advice of your mentor when creating your goals and use their feedback to develop action items. See the appendices for examples of goals and action items, plus some templates. You can have as few, or as many goals in your action plan as you see fit.

# Step 4. Implementing Your Plan

Once you have had your first meeting with your mentor and used their feedback and insights to help develop your plan, it’s time to implement it!

Work towards your action items, document your progress, and include your updated action plan in the next mentorship meeting agenda.

## How to get help

If you have any questions or need any support, contact the LMP Mentoring Committee.

**LMPMC@utoronto.ca**

# Appendix 1: questions for mentees to ask in meetings

The following examples are suggestions to inspire and guide you. Take and adapt what you need to suit your own circumstances.

## Making an agenda with discussion points

We recommend you include the date of the meeting, and the date of the next meeting on the meeting agenda.

* Meeting Date:
* Next Scheduled Meeting:

## General mentee questions for skills development

1. What skills have allowed you to succeed within your program?
2. What activities could I get involved in to expand my network within graduate school? (extracurriculars, becoming a Teaching Assistant (TA), etc.)
3. What Scholarship opportunities would you recommend pursuing? How do you complete a scholarship application/get feedback?
4. How have you been able to learn about different research/lab techniques?
5. Can you describe the process of presenting at research conferences? How were you able to find these conferences> How did you apply?

## General mentee questions for career development

1. Can you tell me a little bit about your current responsibilities?
2. Can you describe a typical day for you?
3. How did you get into this field? What kinds of additional experience or training did you need to have in order to get a job in this field?
4. What are potential future career opportunities for someone in your position?
5. What types of skills and experiences are essential for succeeding in your position?
6. How would you describe the culture, management style, and organization of where you work?
7. Are there professional organizations that I should consider joining or websites that I should be looking at to get additional information?
8. What advice would you give someone in my position who wants to pursue opportunities in this field?

## General mentee questions for academic development

1. How have you been able to develop as a student?
2. Are there specific resources (software, reference managers, forums, workshops classes) you have found useful throughout your studies?
3. How have you been able to maintain a good working relationship with your supervisor?
4. What recommendations would you give with regards to writing a CV?
5. What does the requirements and timeline look like for a MSc/PhD program (course requirements, thesis submission, defense, etc.)
6. How have you prepared for/scheduled Thesis Advisory Committee (TAC) meetings?
7. What is the overall workflow of publishing a scientific research article? Or Writing a grant proposal?

# Appendix 2: templates for action plans and goals

Below are some of examples of how you can develop and structure your goals.

These include goal examples for:

1. Academic development
2. Skill development
3. Career development

## Academic Development Goal Examples

|  |  |
| --- | --- |
| Goal | Write research proposal for the Ontario Graduate Scholarship (OGS) |
| Start date | January 30, 2022 |
| Target completion date | March 15, 2022 |
| Action Item(s) | * Attend research proposal writing workshop hosted by “X” * Complete 1st draft and send to (mentor/supervisor/Post-Doc/peer) to get feedback before submission deadline * Incorporate feedback and send next draft to supervisor for approval |
| Progress/reflection | * Document progress/reflection on action items for next meeting |

|  |  |
| --- | --- |
| Goal | Update CV |
| Start date | February 15, 2022 |
| Target completion date | February 20, 2022 |
| Action Item(s) | Schedule meeting with “X” to discuss effective CV writing strategies/formats  Consult the university academic advisor/SGS for CV writing resources |
| Progress/reflection | Document progress/reflection on action items for next meeting |

|  |  |
| --- | --- |
| Goal | Develop a strong foundation of scientific knowledge |
| Start date | September 30, 2022 |
| Target completion date | January 15, 2023 |
| Action Item(s) | Subscribe to PubMed, Mendeley to have scientific research articles focusing on “X” sent to me each week, and read at least 1 article per week  Sign up to present a paper in “X” Journal Club once per semester  Review lab protocols and make notes/formulate questions about different types of experiments  Ask senior-student if I can shadow them for their experiments |
| Progress/reflection | Document progress/reflection on action items for next meeting |

## Skill Development Goal Examples

|  |  |
| --- | --- |
| Goal | Strengthen my understanding of data analysis |
| Start date | August 20, 2022 |
| Target completion date | December 20, 2022 |
| Action Item(s) | Enroll in “X” introductory course (R, Python, Stata, Machine learning, statistics etc.)  Attend office hours to ask specific questions, and expand my network with professor |
| Progress/reflection | Document progress/reflection on action items for next meeting |

|  |  |
| --- | --- |
| Goal | Enhance my public speaking skills |
| Start date | November 1, 2022 |
| Target completion date | March 30, 2023 |
| Action Item(s) | Solicit specific feedback on my presentation skills from lab members after my lab meetings  Sign up for the Peer-Communication Team Presentation feedback  Register for a 3-minute thesis competition and attend their training seminars  Present at the “X” research conference |
| Progress/reflection | Document progress/reflection on action items for next meeting |

## Career Development Goal Examples

|  |  |
| --- | --- |
| Goal | Research qualifications and opportunities for “X” career path |
| Start date | June 1, 2021 |
| Target completion date | August 15, 2021 |
| Action Item(s) | Conduct 5 information interviews with industry professionals by reaching out to them via LinkIn/email/phone  Take notes about their journey/advice, and keep in touch with them to expand my network  Attend the “X” Career Panel on “X” date |
| Progress/reflection | Document progress/reflection on action items for next meeting |

|  |  |
| --- | --- |
| Goal | Gain experience in scientific consulting |
| Start date | December 1, 2022 |
| Target completion date | February 15, 2023 |
| Action Item(s) | Attend the Online lecture series for the Graduate Management Consulting Association  Set up 3 informational interviews with students who are interning at the University Consulting Group with the goal of learning how to achieve an internship position |
| Progress/reflection | Document progress/reflection on action items for next meeting |

# Appendix 3:Templates to help you set goals and plan meetings for mentoring

## Setting goals for your mentoring relationship

Review and complete this worksheet with your mentor.

Set three career-related, professional or educational goals with your mentor. You can identify your goals leading up to your graduation and transition to the workforce or create a longer timeline and identify your goals for the next 6 months, 1 year and 5 years.

Define the skills, knowledge and resources needed to achieve these goals and outline the required actions and timeline.

You can find inspiration and examples in the document ‘**Planning your mentoring relationship’** [on our website](https://lmp.utoronto.ca/resources-mentors-and-mentees-lmp).

Goal 1: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Goal 2: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Goal 3: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

## Actions identified to achieve goals

|  |  |  |  |
| --- | --- | --- | --- |
| **Goal** | **Knowledge and skills required** | **Actions to achievement** | **Timeline** |
| Goal 1 |  |  |  |
| Goal 2 |  |  |  |
| Goal 3 |  |  |  |

## Mentorship meeting plan/schedule

|  |  |  |  |
| --- | --- | --- | --- |
| Mentorship Meeting Schedule (Dates) | Format (Zoom, in person) | Goals/skills to be discussed | Plans to develop skills/obtain goals (i.e. workshops, seminars, studies, meetings, trainings, etc) |
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