Annual Graduate Student IDP and Mentoring Worksheet

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| **Student name:** | **Faculty advisor:** |
| **Date of joining the group:** | **Review period:** |
| **Anticipated graduation date:** | **Mentoring meeting date:** |

This worksheet is intended to facilitate an annual conversation between the PI and graduate student, focusing on your progress towards degree completion, professional development, mentoring needs, and group climate. This worksheet is intended to:

1. Evaluate your scientific accomplishments in the past year,
2. Discuss what is working and areas for improvement.
3. Identify opportunities for professional development.
4. Discuss group climate.
5. Discuss near-term and long-term plans, and develop a strategy for realizing those plans.
6. Provide feedback to you.

A conversation based on each section of this worksheet would allow 2-way feedback and opportunity to develop specific, achievable goals for the next year. The worksheet should be filled out before our first January project meeting.

It is recommended that each question be responded to with 5 sentences (or bullet points) or less.

**Part I. Scientific Progress**

Briefly, describe your scientific progress during the last year. Did you accomplish the goals that you set for yourself?

What are your principal research goals for the next 12 months?

List any papers, posters, and conference talks you submitted/gave last year:

List suggested paper titles or topics for papers that you expect to draft/submit for publication next year:

List conferences you would like to attend next year:

List projects in the group that you lead. Are you satisfied with your progress on each project? (consider intellectual ownership, support from collaborators/labmates/advisor, available resources, and personal passion for the project)

What can I do to help you with any of the projects where you are dissatisfied with your progress?

Do you feel that your workload in the lab is too high, too low, or just right?

What skills would you like to acquire/master in the next term?

What is your target graduation timeline?

**Part II. Professional Development**

What opportunities for technical learning, acquiring teaching or mentoring experience, or developing other professional skills did you seek out in the passing year, and what opportunities do you plan to seek out next year?

What is your long-term career goal (i.e., what would you consider an ideal job)?

**Part III. Mentoring Needs**

What has been the most useful support provided to you to support your scientific endeavors as well as your progress towards personal/professional goals in the past year? How else can I support you in these areas?

Do you feel you are getting critical feedback in a constructive and unambiguous way? Do you feel that you are clear on what I expect of you?

For this upcoming year, what would be the highest priority action I could take or support I could provide you to achieve your goals?

Do you have mentors outside of the lab? If not, what are mentoring gaps you would like to fill and how can I help you connect to those type of mentors?

**Part IV. Group Climate**

In general, do you enjoy coming into work?

Are there any changes you would suggest regarding the way in which the group functions? (e.g., group meetings, student roles in the group, group processes and policies)?

What are the most rewarding aspects in the group to date?

What are aspects that have presented the most challenges or barriers in your work in the group to date?

Is there anything else you'd like to share?