**Individual Development Plans**

***Example #1: Individual Development Plan (IDP)\****

**1. Name**\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ **2. Date\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**3. Academic Series and Rank**

|  |  |
| --- | --- |
| Ladder RankIn-ResidenceAdjunctClinical Health Science Clinical  | AssistantAssociateProfessor |

**4. Primary Mentor\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_** Additional Mentor(s)**\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**5. Identify Personal and Institutional Long Term Goals**

*Why did you decide to work at a medical school?*

 *What do you personally hope to accomplish in your career?*

*List your Academic Series requirements (see Academic Criteria for Series)*

List other goals discussed with Chair/Division head.

**6. Areas of Focus: Definition and Distribution of Effort**

 The following six areas of focus generally describe the areas where faculty direct their efforts to successfully accomplish their personal, institutional and academic series goals.

**• Teaching—Excellence in Education**

Teaching, student advising, continuing medical education (CME), new course development

**• Research/Creative Activity—Leadership in Innovative Research**

Conducting basic science and/or clinical research, presentations, publications, application for and receipt of grant support, copyrights and patents, editing, and peer review

**• Clinical Care—State-of-the-Art Clinical Care**

Direct patient care, chart review, related clinical activities, and clinical budget performance

**• Service—Leadership in Governance**

Participation or leadership in governance, committee membership, collegial activities. Suggested service priority: Department, SOM, UCDHS, University, Professional, Community

**• Self Development—Networking, Work-Life Balance and Additional Mentors**

Faculty Development activities, leadership programs, CME training, earning advanced degrees, participation in professional academic associations or societies, developing professional contacts, consulting in one’s field, expanding network contacts, balancing work and personal life, utilizing additional mentors in specific areas of focus

**Distribution of Effort**

Estimate the hours per week spent in each focus area, then list the percentage of total duties.

|  |  |  |
| --- | --- | --- |
| Focus Area | # Hrs/Week | % of Total Duties |
| Teaching |  |  |
| Research |  |  |
| Clinical Care |  |  |
| Community Engagement |  |  |
| Administration/Service |  |  |
| Self-Development (Networking, Work-Life Balance, Additional Mentors) |  |  |
| Total |  |  |

**7. Specific Goals in Focus Areas**

Complete the focus areas that specifically apply to the criteria for your academic series that will help you accomplish your personal and institutional long- term goals.

**Teaching**

Year in Review: Please list last year’s goal(s) and significant accomplishments (teaching appointments, invitations, and course or program improvements). If the goals were not met, explain and identify barriers.

*Upcoming year’s teaching goal(s):*

*Identify resources, collaborators, and time commitment needed to achieve goal(s):*

*Identify barriers to achieving new goal(s):*

**Research and Research Related/Creative Activities**

Year in Review: Please list last year’s goal(s) and significant accomplishments (major publications, grants, presentations, invitations). If the goals were not met, explain and identify barriers.

*Identify in a single sentence the focus of your scholarly activity.*

*Upcoming year’s research goal(s):*

*Identify resources, collaborators, and time commitment needed to achieve goal(s):*

*Identify barriers to achieving new goal(s):*

**Clinical Care**

Year in Review: Please list last year’s goal(s) and significant accomplishments (exceptional patient care, development of new techniques, clinical programs). If the goals were not met, explain and identify barriers.

*Upcoming year’s patient care goal(s):*

*Identify resources, collaborators, and time commitment needed to achieve goal:*

*Identify barriers to achieving new goals:*

**Service**

Recommended service priority: Department, School, University, Professional, and Community.

Year in Review: Please list last year’s goal(s) and significant accomplishments. If the goals were not met, explain and identify barriers.

*Upcoming year’s administration goal(s):*

*Identify resources, collaborators, and time commitment needed to achieve goal:*

*Identify barriers to achieving new goal(s):*

**Self Development (Networking, Work-Life Balance, Additional Mentors)**

Year in Review: Please list year’s goal(s) and significant accomplishments. If the goal were not met, explain and identify barriers.

*Upcoming year’s self-development goal(s):*

*Identify resources, collaborators, and time commitment needed to achieve goal(s):*

 *Identify barriers to achieving new goal(s):*

**8. Optimal Distribution of Effort**

Revisit the table, “Distribution of Effort,” in step 6. Create a new Optimal Distribution of Effort table, taking into account your specific goals listed in step 7.

|  |  |  |
| --- | --- | --- |
| Focus Area | # Hours/Week | % of Total Duties |
| Teaching |  |  |
| Research |  |  |
| Clinical Care |  |  |
| Community Engagement |  |  |
| Administration/Service |  |  |
| Self-Development (Networking, Work/Life Balance and Additional Mentors) |  |  |
| Total |  |  |

**9. We have met and discussed this annual Individual Development Plan (IDP)**

 **Mentee\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

 **Mentor\_\_**\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ **Date\_**\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**\***Adapted from IDP form presented by Russell G. Robertson MD, Medical College of Wisconsin, 2004 AAMC Faculty Affairs Professional Development Conference. Accessed 5/15/10 at: www.ucdmc.ucdavis.edu/facultydev/docs/NewCareerMntrgIDP.rtf.

***Example #2: Mentoring Plan Worksheet\****

**Your Goals**

Prior to meeting with your mentor, take some time to think about and write down your research and professional goals. You may want to articulate one- and five-year goals. For example, a short-term goal might be “to submit an NIH career development grant application” and a long-term goal might be “to have enough publications for promotion to Associate Professor.”

|  |  |
| --- | --- |
| **Short-term Goals (next year)** | **Long-term Goals (next 5 years)** |
| 1. | 1. |
| 2. | 2. |
| 3. | 3. |

**Potential Mentors**

Identify people who can assist you in meeting your goals. These can be mentors internally or at other institutions. For each potential mentor, identify objectives, develop a list of what you can offer, and propose outcomes. A blank grid is included on the next page to help you organize your thoughts. Put your initial thoughts down on paper before you approach a mentor, and then revise it as your relationship changes.

**Approaching Mentors**

We suggest that you first approach mentors by sending an e-mail that includes a request for a meeting, a brief summary of your goals, and why you think there would be a good fit between you and the mentor. Let potential mentors know how you are hoping to work with them, such as one-on-one, as one of many mentors, or as part of a mentoring team or committee. You might want to let them know how you think they would be able to contribute.

**Identify Mentorship needs**

Identify competencies that you will need to gain expertise in (see Table below for examples). Identify people who can assist you in achieving these competencies and in meeting your goals. These can be mentors internally at your institution, or at other institutions. A blank grid is included on the next page to help you organize your thoughts. Put your initial thoughts down on paper before you approach a mentor, and then revise it as your relationship changes.

|  |  |
| --- | --- |
| Designing research  | Establishing goals  |
| Writing grants  | Finding funding  |
| Managing your career  | Managing staff  |
| Leading teams  | Preparing for promotion  |
| Cultural competence  | Navigating institution  |
| Managing care  | Managing conflict  |
| Speaking before groups  | Knowing career paths  |
| Teaching effectively  | Hiring personnel  |
| Collaborating effectively  | Managing budgets  |
| Managing data  | Mentoring others  |
| Giving feedback  | Evaluating literature  |
| Assessing students  | Medical informatics  |
| Organizational dynamics |  |

**Managing Relationships with Your Mentors**

Relationships should be nurtured and respected. If you and your proposed mentor develop a working relationship, have some guidelines for how you will work together. Here are some tips:

* Schedule standing meetings ahead of time and keep them
* Give your mentor(s) plenty of time to review drafts of grants and manuscripts
* Don’t be a black hole of need – limit the number of requests you make of any given mentor
* Develop authorship protocols so that expectations are clear
* Saying thank you is priceless

|  |
| --- |
| **Mentoring Plan** |
| ***Mentor Name*** | ***Objectives****(e.g., understand how* *to manage multi-site research projects)* | ***What I can offer****( e.g. grant writing, publications)* | ***Outcomes****(e.g. submit* *multi-center research grant proposal)* |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |

\*Adapted from Ann J Brown, MD MHS, Vice Dean for Faculty, Duke University School of Medicine. Accessed 5/28/10 at http://facdev.medschool.duke.edu

***Example #3: Mentoring Worksheet\****

Mentor: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Mentee: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Date of Meeting: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Goal: Teaching Goal metMaking ProgressNo Progress

Accomplishments:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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Obstacles:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

New goal or strategy to overcome obstacles (if needed):\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Goal: Clinical Care Goal met Making ProgressNo Progress

Accomplishments:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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Obstacles:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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New goal or strategy to overcome obstacles (if needed):\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Goal: Research  Goal metMaking Progress No Progress

Accomplishments:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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Obstacles

New goal or strategy to overcome obstacles (if needed): \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Goal: Service Goal met  Making Progress  No Progress

Accomplishments:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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Obstacles:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

New goal or strategy to overcome obstacles (if needed): \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Goal: Self Development  Goal metMaking ProgressNo Progress

Accomplishments:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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Obstacles: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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New goal or strategy to overcome obstacles (if needed): \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Goal: Networking  Goal met Making ProgressNo Progress

Accomplishments:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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Obstacles: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

New goal or strategy to overcome obstacles (if needed): \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Goal: Work/Life Balance  Goal met Making ProgressNo Progress

Accomplishments:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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Obstacles: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

New goal or strategy to overcome obstacles (if needed): \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Goal: Additional Mentors Goal met  Making Progress  No Progress

Accomplishments:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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Obstacles:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

New goal or strategy to overcome obstacles (if needed): \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

\*Accessed from University of California-Davis on 5/15/10 at http://www.ucdmc.ucdavis.edu/facultydev/mentoring.html (Document: Mentoring Update Worksheet)

**Mentoring Agreements (Contracts)**

**Example: University of Pittsburgh Team Mentoring Agreement**

**Clinical Research Scholars Program (CRSP) Team Mentoring Expectations**

A critical element of the CRSP is the use of team mentoring. For this program, team mentoring means more than having multiple mentors working with the mentee; it means having mentors working together as a team to contribute to the mentee’s career development. The concept was developed through the NIH Roadmap initiative which found that “the scale and complexity of today's biomedical research problems increasingly demands that scientists move beyond the confines of their own discipline and explore new organizational models for team science.” Today’s research requires bringing together the perspectives of multiple disciplines to examine a research question right from the beginning. This multidisciplinary approach allows us to develop and conduct research projects that are new and innovative and that would not be possible using a traditional single discipline or multiple disciplines working individually with a mentee approach. It is the synergy created when investigators from multiple disciplines come together that will result in the development of new scientific approaches. This team mentoring model provides benefits for the mentee as he/she learns multidisciplinary methods of discovery and the mentors as they have the opportunity to bring fresh perspectives to the research question they are examining. The CRSP is promoting the development of this team science through the conduct of multidisciplinary research and the use of team mentoring for mentees.

Team Mentoring Goals

1. To enhance the supportive academic environment for the conduct of team science for the mentee.
2. Working as a team and providing multiple perspectives, to facilitate the entry of mentee into the University culture, including the structures, processes, and interpersonal climate of the University.
3. To facilitate the development of appropriate clinical research skills and team science approaches related to the balance and evaluation of research, scholarship, and service.
4. To provide opportunities for developing and working on mentored and independent multidisciplinary research projects with a multidisciplinary clinical research team.
5. To enhance decision-making and other skills involved in working with a team related to the mentee’s career development and advancement.

Expectations of Mentors

1. The mentoring team must conduct regular and frequent team meetings with the mentee. There should be a minimum of one hourly meeting of the primary mentors and the mentee per week, and at least one hourly meeting per month of the entire mentoring team and the mentee. Consultants contributing to specific research issues should meet with the team when these issues are being discussed or decisions regarding these issues are being made.
2. The mentoring team must participate in the one-day team mentoring training retreat to obtain or enhance skills in team mentoring.
3. The mentoring team will develop, with the mentee, clearly delineated specific expectations of the substantive learning/skills to be achieved through the use of team mentoring in the program.
4. The mentoring team will develop, with the mentee, clearly delineated specific milestones and timelines for achieving program goals.
5. The mentoring team will attend meetings and seminars in which the mentee is presenting.
6. The mentoring team will participate in biannual evaluations and assessments of the team mentoring relationships. The MAC reserves the right to change the mentoring team should difficulties continue for a sustained period of time.
7. The content of all exchanges between the team mentors and the mentee are subject to the expectations of professional confidentiality. Although this confidentiality is legally limited, the contents should not be discussed with anyone else without written permission from the mentee.

Expectations of Mentees

1. The mentee must conduct regular and frequent team meetings with the mentoring team. There should be a minimum of one hourly meeting with the primary mentors per week and at least one hourly meeting per month with the entire mentoring team. Consultants contributing to specific research issues should meet with the team when these issues are being discussed or decisions regarding these issues are being made.
2. The mentee must participate in the one-day team mentoring training retreat to obtain skills in working in a team science environment.
3. The mentee will develop, with the mentoring team, clearly delineated specific expectations of the substantive learning/skills to be achieved through team mentoring in the program.
4. The mentee will develop, with the mentoring team, clearly delineated specific milestones and timelines for achieving program goals.
5. The mentee will share career plans, recount initiatives on behalf of his/her professional development; ask for advice; reflect on the mentoring team’s observations and inform the mentoring team about the results of the mentee’s efforts.
6. The mentee must present the mentee’s work to the MAC and at seminars with the mentoring team in attendance.
7. The mentee will participate in biannual evaluations and assessments of the mentoring team relationships. The MAC reserves the right to change the mentoring team should difficulties continue for a sustained period of time.
8. The mentee will keep the content of the team mentoring relationship confidential; the mentoring team may share personal information that they wish to be honored as confidential.

We, acting as team mentors and mentee, agree to enter into a team mentoring relationship based on the criteria described above, which sets forth the expectations, parameters, and process for the mentoring relationship.

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ (mentor’s signature) date\_\_\_\_/\_\_\_\_/\_\_\_\_

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ (mentor’s signature) date\_\_\_\_/\_\_\_\_/\_\_\_\_

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ (mentee’s signature) date\_\_\_\_/\_\_\_\_/\_\_\_\_

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ (CRSP director's signature) date\_\_\_\_/\_\_\_\_/\_\_\_\_

Additional mentors as applicable

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ (mentor’s signature) date\_\_\_\_/\_\_\_\_/\_\_\_\_

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ (mentor’s signature) date\_\_\_\_/\_\_\_\_/\_\_\_\_

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ (mentor’s signature) date\_\_\_\_/\_\_\_\_/\_\_\_\_

The Institute for Clinical Research Education, serving as the Research Education and Career Development Core of the [Clinical and Translational Science Institute (CTSI)](http://www.ctsi.pitt.edu)

University of Pittsburgh



**INSERT AAMC compact in final PDF ( 6 page long)**

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Mentor/Mentee Relationship

***Mentorship Agreement***

**1. Check the topics you will address in mentoring sessions.**

|  |  |
| --- | --- |
| Teaching | Additional Mentors |
| Research | Self Development |
| Clinical Care | Networking  |
| Service | Work/Life Balance |

**2. Check the frequency of meetings for this year.**

|  |  |  |
| --- | --- | --- |
| Weekly |  Bi-monthly | Other \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |
| Monthly | Quarterly |

The Administrative Assistant responsible for scheduling meeting is: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

The Administrative Assistant phone number is: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**3. Information provided by mentee prior to each meeting.** None
 Updated CV (with highlight of new additions)
 Narrative of each topic to be discussed
 Mentoring Worksheet
 Other

**4. Please review, discuss, edit and check the expectations for this mentoring relationship

Responsibilities of Mentor:** Provide assessment and feedback regarding accomplishments in each topic area and help plan “next steps”
 Emotional Support
 Advocacy
 Actively address any problems with mentorship relationship
 Help set priorities to achieve academic advancement
 Encourage creativity and broader thinking
 Other (please specify) \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

 **Responsibilities of Mentee:** Understand the academic series; review career with Department Chair annually and with the Associate

 Dean of Academic Personnel when needed
 Provide goals and updates
 Actively address any problems with mentorship relationship
 Other (please specify) \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

1. **If mentorship relationship not working, we will discuss with Departmental Director of Faculty Development and seek guidance and resolution.**
2. Mentor, Signature: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Mentee, Signature: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

\*Accessed from UC Davis Health System: [www.ucdmc.ucdavis.edu/facultydev/docs/NewCareerMgtrgMentorshipAgreement.doc](http://www.ucdmc.ucdavis.edu/facultydev/docs/NewCareerMgtrgMentorshipAgreement.doc)

***Detailed Agreement***

**Center for Translational Science Activities**

 ***Expectations for the CTSA Scholar Mentoring Relationship***

**Objectives:** This agreement is intended to assist the scholar and mentor to: 1) explicitly define their goals and specific expectations with respect to their mentoring relationship; 2) ensure alignment of their expectations in order to achieve each other’s goals. This agreement is a follow-up to the “Initial Agreement” submitted by the scholar and the primary mentor with the scholar’s program application and will assist with more specific definition of the goals and expectations of the scholar and their primary and secondary mentors (if applicable) for their mentoring relationships. These agreements augment (but do not replace) the scholar’s career development plan and the mentor’s letter of support.

**Instructions:** The scholar, and each of his/her primary and secondary mentors (if applicable), should discuss their goals for the mentoring relationship and review the expectations listed in the “Initial Agreement” between the scholar and the primary mentor that accompanied the scholar’s application. The scholar and each mentor should discuss and agree upon their expectations for the mentoring relationship. Specific expectations, especially for the upcoming year, should be described in this “Detailed Agreement.” Separate Detailed Agreements should be formulated between the scholar and each of the mentors, although agreements may cross-reference each other. Signed copies of this document, signifying agreement, should accompany submission of the research proposal. These agreements will be reviewed and updated at least once a year.

**Goals of the Scholar Goals of the Primary/Secondary Mentor**

|  |  |
| --- | --- |
| Print Name: | Print Name: |
| Describe your short- and long-term goals in this relationship. Relate your goals to your career development plan. | Describe your short- and long-term goals in this relationship. Relate your goals to your career development plan. |

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**Expectations for the Scholar Expectations for the Mentor**

Research Research

|  |  |
| --- | --- |
| Describe your specific expectation for this relationship, especially for the upcoming year. Focus on the following:• Major research milestones, including protocol development and approval,presentations, manuscripts, and grant submissions;• Support you will need to conduct your research, including protected time and funds for research expenditures and the sources of this support;• Interactions with your mentor and your research team (including other mentors and co-investigators), including the nature and frequency of meetings. | Describe your specific expectations for this relationship, especially for the upcoming year. Focus on the following:• Major research milestones for the scholar, including protocol development and approval, presentations, manuscripts, and grant submissions;• Support the scholar will need to conduct his/her research, including protected time and funds for research expenditures and the sources of this support, including the support you will provide;• Interactions with the scholar and the research team (including other mentors and co-investigators), including the nature and frequency of meetings. |

Education/Training Education/Training

|  |  |
| --- | --- |
| Describe the additional education and training you need for your career, focusing on that which will occur outside of coursework offered through the CTSA (refer to your career development plan, as needed). | Describe how you will assist the scholar to obtain the additional education and training, particularly that which will occur outside of coursework offered through the CTSA. (Note: you may also identify others, such as another mentor, who will play a major role in assisting the scholar with additional education and training.) |

Academic Skills Academic Skills

|  |  |
| --- | --- |
| Describe the academic skills you need to develop (e.g., critical thinking, writing grants and manuscripts, oral presentation, leadership, teaching, mentoring). | Describe how you will assist the scholar to develop his/her academic skills (e.g., critical thinking, writing grants and manuscripts, oral presentation, leadership, teaching, mentoring). (Note: you may also identify others, such as another mentor, who will play a major role in assisting the scholar with the development of specific academic skills.) |

Career Development Career Development

|  |  |
| --- | --- |
| Describe what you need to do to advance your career (e.g., work toward independence, obtain a faculty position, be promoted academically, be named to positions on key committees or groups, network with other researchers inside an outside the institution). | Describe how you will assist the scholar to advance his/her career. (Note: you may also identify others, such as another mentor, who will play a major role in assisting the scholar with specific aspects of career advancement.) |

Personal Conduct Personal Conduct

|  |  |
| --- | --- |
| Describe any factors that may affect interpersonal interactions with your mentor and how you plan to manage them. (Note: it is appropriate to acknowledge differences in gender, race/ethnicity, culture, personality, or style that may need to be managed actively.) | Describe any factors that may affect interpersonal interactions with the scholar and how you plan to manage them. (Note: it is appropriate to acknowledge differences in gender, race/ethnicity, culture, personality, or style that may need to be managed actively.) |

**Signature \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Signature\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**Date \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

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**University of Alabama-Birmingham (UAB)**

 **CENTER FOR CLINICAL AND TRANSLATIONAL SCIENCE**

**MENTORED CAREER DEVELOPMENT PROGRAM (CCTS KL2)**

**Mentoring Contract**

This contract is between the KL2 Scholar (mentee) and his/her mentors. It is to be thoroughly reviewed and completed prior to the Selection Interview. Before completing the contract, the mentee should make at least four copies of the document. The mentee and each mentor must complete the form individually, and then jointly review and discuss each person’s answers in order to reach an agreement. The mentee must re-write the agreed upon answers before the contract is signed and dated by him/her and each mentor. The mentee is responsible for keeping the contract and reviewing/updating it as necessary. The first joint review should occur one month after the initial meeting to check-up and agree to any needed changes.

1. What type of assistance does the mentee want from the mentor?
2. What expectations do the mentors have of the mentee?
3. What expectations does the mentee have of the mentors?
4. How often will you meet?
5. When and where will you meet?
6. For how long?

1. Who will be responsible for scheduling the meetings?
2. What will meeting topics include?
3. What will be the ground rules for discussions? (e.g., confidentiality, openness, candor, truthfulness, etc.)
4. If problems arise, how will they be resolved?
5. Any concerns the mentee wants discussed and resolved?
6. Any concerns the mentors want discussed and resolved?
7. How will you know when the mentoring relationship has served its purpose and needs to be terminated?
8. We have agreed that our initial meetings will focus on these three topics:

a. \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

b. \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

c. \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

1. Any additional areas/issues you want to discuss and agree to?

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Mentee Signature Date

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Mentor Signature Date

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Mentor Signature Date

Hook, Edward W III and Wrenn, Audrey.  *UAB Center for Clinical and Translational Science Mentoring Contract.* ([*http://www.uab.edu/ccts/Documents/Mentor%20Contract%20-%203%20pages.pdf*](http://www.uab.edu/ccts/Documents/Mentor%20Contract%20-%203%20pages.pdf)*)*