CCTSI KL2 Scholar and Mentor Agreement for \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_(mentee)

Objectives: This agreement is intended to assist the KL2 scholar and mentor(s) to:

1) Explicitly **define specific goals and expectations** with respect to their mentor-mentee relationship;

2) **Ensure alignment of their expectations** in order to achieve each other’s goals.

*These agreements augment (but do not replace) the scholar’s career development plan as outlined in his or her KL2 application, and the mentor’s letter of support.*

Instructions: The scholar, along with each of his/her mentors should discuss **goals** for the mentoring relationship and review the expectations listed in the career development plan that accompanied the scholar’s KL2 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.” A separate agreement should be formulated between the scholar and each of the mentors, although the mentors’ agreements may cross-reference each other. Signed copies of this document, signifying agreement, should be provided to the KL2 program directors within the first four months of the award period. These agreements will be reviewed and updated at least once a year.

**Goals of the Scholar:**

Describe your short- and long-term goals, relating these goals to your KL2 career development plan. For each time frame, please include specific scientific/clinical goals, and career/leadership goals. The **Scientific/Clinical goals** should reflect your vision of how your research will ultimately improve human health. For example, one goal could be "To improve the early detection of patients with multiple sclerosis." The **Career Goals** should reflect a leadership role you may wish to achieve, such as Chief of a Division or leader of an enterprise. For example, a goal could be "To lead a Center for Study of Pediatric Obesity".

1. Short-term goals (next one year):

 a. Scientific/Clinical

 b. Career

2. Long-term goals (next 5 years):

 a. Scientific/Clinical

 b. Career

**Expectations for the Scholar:**

1. Research

Describe your specific *expectations* for the relationship with your mentors that will help you to achieve your short- and long-term goals Please consider how your mentor will help you in terms of

• Protocol development and approval, presentations, manuscripts, and grant submissions;

• *Support* you will need to conduct your research: amount of protected time, funds available for research expenditures and the sources of this support; acknowledge longevity of the resources

• *Interactions* with your mentor and your research team (including all other mentors and co-investigators). How often will you meet, and in what context, with key individuals?

2. 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 CCTSI (refer to your career development plan, as needed). Consider relevant courses, seminars, conferences, lab meetings. How much time will be spent in these endeavors and is this worthwhile? How will they be financed?

3. Academic Skills

Describe the *academic skills* you need to develop and to maintain that may be facilitated by your mentor(s). For each subheading estimate percent effort, and honestly assess their effect on research productivity.

* Research-related (e.g. critical thinking, writing grants and manuscripts, oral presentation)
* Potentially research-related (e.g. leadership, teaching, clinical care, mentoring)
* Important, but not research related (e.g. administrative roles, interviewing, hospital service)

4. Career development

Describe what you need to do *to advance your career* that may be facilitated by your mentor(s) (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).

* Promotion dossier diverse and updated?
* Networking opportunities (consider both on and off campus)
* Sponsorship by mentor or others

5. Personal conduct:

Describe any *factors that may affect interpersonal interactions* with your mentor(s) 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.)

* Communication regarding work
* Stipulations on working off-site
* Stipulations on hours I will not work, and prefer not to be contacted regarding work issues

CCTSI KL2 Scholar and Mentor Agreement for \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_(mentor #1)

**Goals of Primary Mentor:**

Describe your short- and long-term goals in this mentoring relationship with the KL2 scholar. Relate your goals for the KL2 scholar to your own career in research and education.

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1. Short-term goals (next 1 year)

* Number of papers
* Number of abstracts
* Description of meetings to be attended
* Career development grant application
* Relevant local leadership position

2. Long-term goals (next 5 years)

* Career development/independent grant application
* Relevant national leadership position

**Expectations for the Mentor:**

1. Research

Describe your specific expectations for this relationship, especially for the upcoming year. Focus on the following:

• Major research milestones that your will facilitate for the KL2 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.

2. Education/Training

Describe what additional training you feel would benefit the scholar and how you will assist the scholar to obtain the additional education and training, particularly that which will occur outside of coursework offered through the CCTSI. (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.) Consider how such endeavors will be funded, and the timing for specific endeavors.

3. Academic Skills

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.)

* Research-related (e.g. critical thinking, writing grants and manuscripts, oral presentation)
* Potentially research-related (e.g. leadership, teaching, clinical care, mentoring)
* Important, but not research-related (e.g. administrative roles, interviewing, hospital service)

Be sure to address the approximate percentage of time the mentee will devote to developing specific academic skills

4. Career Development

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.)

Specific ways I will sponsor the mentee:

5. Personal Conduct

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.)

CCTSI KL2 Scholar and Mentor Agreement for \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_(mentor #2)

**Goals of Primary Mentor:**

Describe your short- and long-term goals in this mentoring relationship with the KL2 scholar. Relate your goals for the KL2 scholar to your own career in research and education.

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1. Short-term goals (next 1 year)

* Number of papers
* Number of abstracts
* Description of meetings to be attended
* Career development grant application
* Relevant local leadership position

2. Long-term goals (next 5 years)

* Career development/independent grant application
* Relevant national leadership position

**Expectations for the Mentor:**

1. Research

Describe your specific expectations for this relationship, especially for the upcoming year. Focus on the following:

• Major research milestones that you will facilitate for the KL2 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.

2. Education/Training

Describe what additional training you feel would benefit the scholar and how you will assist the scholar to obtain the additional education and training, particularly that which will occur outside of coursework offered through the CCTSI. (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.) Consider how such endeavors will be funded, and the timing for specific endeavors.

3. Academic Skills

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.)

* Research-related (e.g. critical thinking, writing grants and manuscripts, oral presentation)
* Potentially research-related (e.g. leadership, teaching, clinical care, mentoring)
* Important, but not research-related (e.g. administrative roles, interviewing, hospital service)

Be sure to address the approximate percentage of time the mentee will devote to developing specific academic skills

4. Career Development

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.)

Specific ways I will sponsor the mentee:

5. Personal Conduct

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 of Scholar Signature Date

Signature of Mentor #1 Signature Date

Signature of Mentor #2 Signature Date