Suggested Guidelines

**Postdoc/Faculty Mentor Career Progress and Mentorship Annual Meeting**

While you as a postdoctoral scholar are responsible for your career trajectory and success, it is reasonable to expect Stanford faculty members to provide on-going mentoring, guidance, and resources, in both scientific and career development, to support you toward your goals. In principle, Mentors should initiate those conversations and discuss research direction and progress and career goals. However, often advisors are not accustomed to such discussions and get caught up in other priorities. It is then important that you request those conversations.

*Remember that a postdoc is a training period. To get the best training is it critical that you be dedicated to the scientific goals of your project and also that you exhibit and continue to develop independent thinking, identification of key questions, and strategies to answer these questions in the immediate and longer term.*

To ensure that good mentoring and feedback happen, in addition to the regular scientific discussions, you should ensure that you have, with your advisor: (1) an initial meeting at the start of the postdoc appointment; (2) annual meeting(s) to review progress and discuss goals; and (3) an exit interview at the conclusion of your postdoc. These meetings should be one-on-one, not part of larger meetings. Many have found the following meeting objectives and timelines to be very useful:

**Initial Meeting:** A formal discussion within the first four weeks of the postdoc appointment. **Meeting Goal:** Career-orientation, objectives, research project definition, and appraisal of needed skills.

**Annual Progress Meeting:** A formal discussion at the anniversary of your appointment or, if easier, closely following the New Year. You should have analogous and complementary meetings with secondary mentors or other faculty mentors. In some instances it may be useful for them to attend in one larger meeting. In addition, some departments have yearly committee meetings for postdocs. While not yet standard, this appears to be a great way to get broad and diverse feedback on progress and objective, both short and long term. **Meeting Goal:** Progress is evaluated and goals are set for the following year.

**Exit Interview:** A formal discussion at the end of your appointment. **Meeting Goal:** Address future research trajectories; differentiation strategies if you are pursuing the same lines of research as the PI; and possible opportunities or plans for collaboration or future mentoring.

All faculty have received the following templates for the Initial Meeting and the Annual Progress Meeting, although different mentors will have different perspectives on the specifics of these and other guidelines.
**Expectations for Stanford faculty in a mentoring relationship with postdoctoral scholars**

In addition to the meetings above, members of the Stanford faculty are expected to:

1) Encourage postdocs to seek secondary mentors who could provide them with opportunities in new areas of research, foster collaboration and offer them with guidance and support to assist with their career goals
2) Seek the participation of these secondary mentors or multiple other faculty members in the annual progress reviews with their postdocs
3) Encourage postdocs to participate in career development activities (workshops, courses, pre-conference events), recognizing that the short postdoc training period means seeking such information early in the training period.
4) Encourage postdocs to engage in social networking opportunities, such as attendance of talks and seminars in the department or University-wide.

The National Institutes of Health and the Association of American Medical Colleges endorse a set of commitments by both the postdoctoral trainee and the research mentor towards supporting the quality of training, reflect the importance of mentoring, and foster breadth and flexibility in career choices made by the postdoc. This Compact Between Postdoctoral Appointees and Their Mentors may be useful to review and is available online at [https://www.aamc.org/download/49852/data/postdoccompact.pdf.pdf](https://www.aamc.org/download/49852/data/postdoccompact.pdf.pdf).
Initial Meeting Template

The following template provides some guiding questions that can facilitate an initial discussion of goals and objectives and assess the immediate training needs for a postdoctoral scholar.

**Postdoc:** complete Parts I to IV and attach your updated CV. Provide both documents to your PI at least 3 days in advance of scheduling your meeting.

**Faculty Mentor and Postdoc:** discuss Parts I to IV and develop action steps towards progress. List agreed-upon action steps in Part V.

---

**Part I. Self-Appraisal**

1. Describe your most proud **accomplishments** (papers, presentations) that you feel contribute to a successful start of your postdoc appointment. What skills do you think you are bringing to the lab/research group?

2. What new areas of learning and growth would you like to develop in the next few months? (e.g., learning a new technique, grant-writing, developing new ‘soft’ skills such as presentation skills)
Part II. Overarching Career Goals.

1. Describe your long-term goals as you see them today. You may include at least one scientific research and one career goal that can be a leadership or non-academic goal like as becoming a department chair, an influential figure in national science policy, or a founder of a company.
   
   a. Goal 1 (scientific/research):
   
   b. Goal 2 (career/professional):

2. What are the primary factors driving those goals (e.g., personal style or preferences such as interests in research, teaching, business, government, writing; geographic priorities; family commitments; financial objectives; international trainee with an assured position in home country; immigrating to the US, etc.):

Part III. Objectives. For each goal above, specify 2 to 5 shorter-term objectives that are important to achieving that goal. These objectives may include mastery and application of technique that is applied to the condition of interest. For example, one objective could be "To apply protein arrays to study human SLE." Other objectives could include: to participate in a University committee, or apply for a policy internship, or take specific courses/professional development opportunities by a certain date.

1. Research/Scientific Objectives Related to Goal 1 (may include one of the following: course, meeting or workshop attendance (specify course); fellowship or grant application; anticipated publication (list tentative title); may include objectives in the coming year or other longer-term objectives (over a 2-year period)
   
   a. __________________________________________
   
   b. __________________________________________
   
   c. __________________________________________
2. **Professional (non-Scientific) Objectives Related to Goal 2:**
   
a. ______________________________________________

b. ______________________________________________

c. ______________________________________________

**Part IV. Opportunities** at Stanford and beyond that can assist in professional/non-scientific objectives in which you would like to participate, such as meetings, courses or workshop attendance (identify meeting/workshop and date)

---

**To be developed jointly by the postdoc and the faculty mentor(s)**

**Part V. Agreed Upon Action Plan for Next Year**

In carrying out activities that may assist you in meeting your Research/Scientific objectives listed above, what actions might you and/or your mentor(s) take in order to be successful? Make the objectives specific, measurable, behavior focused, and within a specific time frame (e.g., I will attend my professional society’s preconference workshop on grant writing this year).
Annual Progress Meeting Template

The following template provides some guiding questions that can facilitate an annual career progress and mentoring meeting between the postdoc and his/her faculty mentor(s).

Postdoc: complete Parts I to III and attach your updated CV. Provide both documents to your faculty mentor(s) in advance of scheduling your meeting.

Postdoc and Faculty Mentor(s): discuss Parts I to III, review goals and objectives and think of action steps towards progress. Discuss with your mentor(s) and complete Part IV together: outlining action steps and activities you agree to do towards making progress and meeting stated goals and objectives.

Part I. Overall progress: Review of the last year

1. Highlight your major accomplishments in the past year (e.g., publications, patents, honors or awards, grants or fellowships):

2. Brief overview of research progress in the past year:

3. List any presentations at professional meetings or conferences outside of Stanford (or those held on campus but included an outside audience)—

4. Coursework/Training: What courses, seminars, conferences, lab meetings, etc. do you participate in? Are they meeting your needs? If not, what else would be helpful?
5. **Teaching Activities**: How much, in percent effort? Is this sufficient for developing multidisciplinary academic skills? In what ways could these activities be interfering with research productivity?

6. **Administrative and Other Duties**, such as assistance with writing grants or mentoring graduate or undergraduate students: How much, in percent effort? Are these activities relevant to your development of academic or professional skills? In what ways could these activities be interfering with your research productivity?

7. Did you accomplish all that you agreed on doing with your mentor under the **Action Plan** during your initial meeting?  
If no, what parts of the plan did you not accomplish and why? Describe/list any unusual or unanticipated **challenges** you experienced.

8. **Mentoring** and Professional Collaborations:  
   a. How often did you meet with your faculty mentor(s) last year?  
      How would you rank the frequency of meetings? Too few  Just right  Too many  
   b. Who are your secondary mentors? Is that person a faculty member? How often did you meet with them?  
   c. Do you have collaborators outside of the lab? Please list their names and roles.
Part II. **Wellbeing:**

a. **Research environment:** What features of the lab group or your relationships with colleagues and collaborators are most helpful and supportive to your wellbeing? What concerns could negatively affect your progress?

b. **Work-life balance:** What do you do to maintain a balance between your work and life/personal needs? What would you like to continue to do, or do differently next year?

c. **Do stresses or concerns exist in your personal life that could impact your work?** How are things going generally? Are you able to take regular breaks and vacations?

Part III. **Goals and Objectives:**

1. Refer to your previous discussion with your faculty mentor(s). What changes or modifications took place?

2. **List up to 5 scientific and career objectives in the coming year.**
3. **What opportunities** at Stanford and beyond can assist you in reaching your professional/non-scientific objectives? For example, participation in meetings, courses or workshop attendance (identify meeting/workshop and date)?

---

**To be developed jointly by the postdoc and the mentor(s) during or after the discussion**

**Part IV. Action Plan for Your Next Steps.** In carrying out activities that may assist you in meeting your Research/Scientific objectives listed above--

1. Projected timeline for completing your current postdoctoral projects

2. Projected timeline for your job search

3. List the **activities** in which you and your mentor(s) agree you should participate that will support you in achieving your scientific and professional objectives in the coming year.

4. What additional actions can you and your mentor continue to do, in order to help you be successful?