**Mentor-Mentee Worksheet and Relationship Planning Guide**

**Suggested Use**: This worksheet is intended for use by the Scholarly Project/Research Mentor and should be completed by the mentor and resident together at an initial in-person meeting. Both the mentor and resident should retain a copy. The form should be reviewed annually.

1. **Resident Goals for Project**
2. What are the resident’s goals for the project?
   1. Personal goals
   2. Professional goals
   3. Project-specific goals (e.g., develop a curriculum, improve clinic workflow, publish an original research article)
3. What skills does the resident hope to gain from completing this project? Are these appropriate and achievable given the resident’s scholarly/research question? (Skills may include IRB preparation, grant writing, quantitative data analysis, qualitative methods, curriculum development, working with community/international partners, manuscript writing)
4. What are the “scholarly activity” requirements of the residency program (e.g., oral and/or written dissemination)? Are opportunities built into the program to achieve these (e.g., institution-hosted research day, opportunities to attend community forums)? Does the resident need to submit work to regional and/or national conferences?
5. How will the resident meet these requirements? Consider working backwards from abstract submission dates to map out a clear and feasible plan. Use the resident’s clinical schedule and timeline to determine when project goals can be accomplished.
6. How does the resident’s project align with his/her other goals? Where does the resident see him/herself in five years?
7. **Project Scope and Feasibility**
8. Is the scope of the project appropriate for the resident?
9. Can the project feasibly be completed during residency training? Does the resident have additional time for project completion as a result of being in a research or other pathway? Will the resident use elective time to complete the project?
10. On what rotations does the resident plan to work on the project? Is this enough time?
11. How will the resident and project mentor address scope and feasibility issues (e.g., reduce the scope of the project, modify the research question, include additional mentors)?
12. **Mentor-Mentee Relationship**
13. Does the resident’s project satisfy mutual research interests?
14. Are the mentor and resident’s work and communication styles compatible? Discuss preferences for meeting frequency, in-person vs. email correspondence, etc.
15. Who are the resident’s project mentors? What roles do they have on the project? Does the primary mentor have the appropriate knowledge and skills related to the resident’s project? If not, does the resident need a new mentor, or can the primary mentor identify additional mentors to assist in the project?
16. Does the primary mentor have time to supervise this project?
17. Can the mentor commit to regular check-ins (email, phone or in-person) with the resident regarding the project? If not, how frequently will the mentor and resident meet? Where will they meet? Will agenda items be shared in advance? How will the resident’s other mentors be involved?
18. Have the resident and mentor developed a plan for assessing the effectiveness of the mentoring relationship? How frequently will the resident and mentor check in about this? What criteria will be used to make this determination?