



Overview of this Resource

This document guides productive career development conversations between mentees and mentors. Mentees, at any stage of their career, can use this tool to share their experience, document their updates and accomplishments, and raise their current and upcoming needs with any mentor.

When to use this tool:

- at the start of a new mentoring relationship (with a developmental or skills mentor, or manager/PI) to share your current work and set mutual expectations and goals.
- in advance of formal annual meetings, such as with a division chief or department chair, to highlight your achievements and advocate for resources.
- periodically (e.g. bi-annually, annually) with a mentor(s) to reassess expectations and stay on track for goals.

Instructions

Mentees:

- Before your meeting, **make a copy of this document** and tailor it to your needs. To make a copy, log into a Google account and select “File→ Make a Copy”. If you don’t have a Google account, select “File→ Download” to export the file.
- Fill in the document and include only information that is new since your last meeting. If it is your first meeting, include only recent highlights. Leave the “Mentee-Mentor Discussion” questions in the Checkpoints blank.
- Share the completed document and your CV with your mentor early enough so that they have time to review them before you meet. We recommend updating your CV and highlighting any new, key information.
- During your meeting, review the document with your mentor and fill in the “Mentee-Mentor Discussion” questions in the Checkpoints together.

Mentors:

- Review the information provided in this document in advance of meeting with your mentee. In particular, review the “Checkpoints,” found in gray boxes throughout the document. Use this tool to set goals and document expectations with your mentee regarding career development. Revisit the document on an agreed-upon timeline.

Note: This document is meant to promote and guide career development conversations but it does not directly list the requirements for promotion at Harvard University. It may be helpful to reference the [Faculty of Medicine Handbook](#) as an additional resource.



Career Development Conversation Guide

Mentee Name:

Mentor Name:

Date of Meeting:

Date of Last Meeting (if applicable):

Primary Goal for this Meeting (e.g. share progress, discuss needed resources):

Time frame covered in this document (Month, Year- Month, Year):

Mentee Work Style

Mentees: Before completing this section, reflect on your work style by completing the exercises on the [Know Yourself page](#) of the Harvard Catalyst mentorship website.

How do you work best? (Consider your approach to time management, preferred communication style, etc.).	
Has your work style evolved since your last career development meeting? If so, how?	
How do you prefer to receive feedback?	



Check Point: Work Style

Mentee Self-Reflection:

Are there any additional new insights that you gained from any assessments or self-reflections that you completed?



Preparing for Career Development Conversations

Mentee-Mentor Discussion:

(Mentor) How do you work best? How do you prefer to give and receive feedback? How do your work styles complement each other? Document your discussion here.

Time Allocation

Indicate the approximate percentage of your time that you currently spend on each activity.

Research	
Clinical Work	
Administrative Work	
Teaching	
Other (specify)	

Mentoring Network

Mentees: Before filling in this table, complete the [Developmental Network Exercise](#) on the [Build a Mentoring Network page](#) of the Harvard Catalyst mentorship website. Add or delete as many rows as needed below.

Name, Degree	Institution	Type of Support (primary mentor, skills mentor (specify type), peer mentor, mentee etc.)	Notes (related funding, skills gained or needed, etc.)



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Checkpoint: Mentoring Network

Mentee Self-Reflection:

What gaps emerged in your mentoring network? What types of people do you need additional support from (e.g., support in scientific/ technical skills, grant or manuscript writing, navigating institutional culture, career advancement)?

Looking ahead to any planned activities or anticipated transitions, are there new mentoring needs that you might have in the near future that wouldn't be met by your current network?

How could you begin to grow your network and fill in your gaps? Are there upcoming opportunities for networking (e.g., relevant conferences)?

Mentee and Mentor Discussion:

How can your mentor support you to grow your network? Summarize your discussion and next steps.



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Publications

New Peer-Reviewed Publications (Accepted, published):	<i>List any new, accepted/published publications here or indicate “See attached CV.”</i>
Peer-Reviewed Publications (Submitted, pending review):	
Manuscripts in preparation:	

Presentations

New, Completed Presentations:	<i>List any new, completed presentations here or indicate “See attached CV.”</i>
Planned Presentations:	

Recent Teaching

List any new teaching experience or indicate “See attached CV.”

Type of Teaching (formal course, invited lecture, panel, curriculum development, research or clinical training, etc.)	Audience (undergraduates, medical students, residents, post-docs, etc.)	Notes (topic, amount of time spent, etc.)



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Funding Sources

Current Funding	
Future/Pending Applications	

Sources of Data

Name	Funding

Space and Available Resources

List your current space and available resources.

Type of Resource	Purpose	Funding



Checkpoint: Resources

Mentee Self-Reflection:

What additional resources (support staff, space, access to tools, etc.) do you need?



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Where and how will you find the resources that you need? What challenges do you anticipate (e.g., cost, logistics)?

Mentee and Mentor Discussion:

How can your mentor support you in the acquisition of resources?
Summarize your discussion and next steps.

Honors, Awards, and Community Connections

For each, list any new honors/awards/experience or indicate "See attached CV."

Honors and/or awards	
Community service/outreach	
Activities contributing to diversity, equity, inclusion, and belonging	

Skills Development

Indicate any skills you have gained recently.

New clinical or technical skills	
New collaboration and team science skills (e.g., leadership, mentorship, communication, grant writing)	



New coursework in progress or completed	
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Checkpoint: Professional Development

Mentee Self-Reflection:

What new skills (scientific, technical, leadership, mentorship, etc.) do you need to advance in your career?

What type of coursework or training could support your skills development?

Mentee and Mentor Discussion:

How can your mentor help you to begin to build these skills? Summarize your discussion and next steps.

Other Achievements or Recognition

List any new achievements/recognition or indicate "See attached CV."

Type (patents, membership on committees or boards, service as a reviewer, etc.)	Notes



Goal Setting

Mentee Goals

Mentees: After completing this document, consider your highest priorities/needs and think about your self-reflection on your strengths and core values. Keep this information in mind as you write your goals below. If applicable, consider how your personal goals relate to the goals of your lab or work environment.

Short-term Goals (next 6 months to a year):

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Long-term Goals (next 3-5 years):

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Checkpoint: Goals

Mentee Self-Reflection:

What support do you need to achieve your goals?

What challenges do you anticipate in achieving your goals?

Mentee and Mentor Discussion:

How can your mentor support you in achieving your goals? Summarize your discussion.

If revisiting goals: What progress has been made towards achieving your goals? Have any new challenges emerged? What additional support do you need?



Preparing for Career Development Conversations

Next Steps: Document any additional action items or next steps to be completed prior to your next meeting.

About

This document was developed as part of Harvard Catalyst's [Mentorship in Clinical and Translational Research guide](#). Explore the guide for additional resources.

Share Your Feedback With Us!

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