**STUDENT RESPONSIBILITIES: I will…**

* meet regularly with you, my research advisor, and provide you with updates on the progress and results of my activities and experiments.
* be knowledgeable of the policies and requirements of my PhD program and UBC.
* work with you to develop a thesis/dissertation project and select a committee.
* request feedback and seek advice from you, my committee, and other mentors.
* attend and participate in lab meetings, seminars, and journal clubs.
* keep up with original literature in my field.
* be a good lab citizen, maintaining a safe and clean space and working collegially with everyone.
* maintain a detailed, organized, and accurate lab notebook.

**ADVISOR RESPONSIBILITIES: I will…**

* be committed to your education and training as a future member of the scientific community.
* be committed to helping plan and direct your research project, allowing you to take ownership of your research while setting reasonable goals and establishing a timeline for completion.
* be knowledgeable of, and guide you through, your PhD program’s requirements and deadlines and advise and assist with your thesis committee selection.
* provide and seek regular and honest feedback on an ongoing basis and be committed to improving as a mentor.
* encourage you to come to me with concerns and help find acceptable solutions to problems as they arise.
* lead by example and facilitate your training in complementary skills needed to be a successful scientist, such as communication, writing, management, and ethical behavior.
* encourage and facilitate your participation in the scientific community through attendance of conferences.
* discuss authorship policies, acknowledge your scientific contributions to my lab, and work with you to publish your work in a timely manner prior to your graduation.

**TRAINING/MENTORING**

1. What requirements do you need to complete over the rest of your degree, and what is your plan to fulfill them?
2. What fellowships are you applying to, and have you been able to get the guidance you need?
3. What are your primary goals in your academic training?
4. What actions can be taken to make sure these needs are met?
5. What motivates you most? (e.g., a sense of belonging to a good team, security/lack of worries, freedom, that your research has meaning, the impact of your research). If it’s more than one thing please rank from most important to least!
6. What de-motivates you?
7. What is important to you in a mentoring relationship?
8. What features of a lab group and your relationships with colleagues are most helpful and supportive to your wellbeing?
9. What help can I or other faculty/staff provide regarding professional development and training?
10. Your success as a student is tightly linked to your wellness. What are you doing to tend to this?

**RESEARCH GOALS**

1. What are your goals for accomplishing in the next six months?
2. What about in the next year?
3. What would you like to be exposed to scientifically in the next year?

**OUR TEAM**

1. Are our one-on-one meetings together useful? What would you like to see more of and less of?
2. Are you having issues with anyone in the group that you would like to discuss?
3. Do you have any issues with our interactions?
4. Do you feel group meetings are useful? What changes would you make?
5. Do you have any suggestions for how the lab space should be organized?
6. Do you have any suggestions on lab practices?
7. Do you have any questions about the group?
8. Do you have any general comments?

**PERFORMANCE ASSESSMENT**

**What was your research progress over the past year (or since the last time we met)? Please list specific major milestones.**

i)

ii)

iii)

[…]

You are making progress on your journey along the academic path. Here we are going to discuss what you need to develop to get to the next step on this journey. It’s important we keep a growth mindset and be focused on improvement! It’s not about what is going wrong, rather where we want to go, and how I, as your advisor, and the team can help you get there.

Please fill out the self-assessment and then send back to me. Use the bucket shading tool to color the assessment . I will fill out your review and then we will discuss it together at our next meeting.

|  |  |
| --- | --- |
| **Red Label** | Requires attention |
| **Yellow label** | Room for growth |
| **Green label** | Proficient |
| **Blue label** | Beyond expectations |

|  |  |  |  |
| --- | --- | --- | --- |
|  | 1. **Details/comments.**
2. **What resources could help you do better?**
 | **Self-Assessment** | **Advisor****Assessment** |
| **Job Knowledge:** 1. Do I have the technical skills and ability to do the job experimentally and computationally?
 |  |  |  |
| **Work (Quality & Quantity):**  |  |  |  |
| 1. Is the work done in an accurate manner?
 |  |  |  |
| 1. Do I take initiative to get things done in my project?
 |  |  |  |
| 1. Can I manage my time effectively in terms of dividing effort amongst tasks?
 |  |  |  |
| 1. Do I like my project(s)?
 |  |  |  |
| 1. Can my advisor rely on me to follow instructions and do what is expected?
 |  |  |  |
| 1. Do I work independently to get the job done?
 |  |  |  |
| 1. Do I accept and act on need to keep supervisor informed?
 |  |  |  |
| 1. Am I able to communicate effectively in written communication (journal articles, emails, technical writing)?
 |  |  |  |
| 1. Am I able to communicate effectively in oral communication (including talk/presentation skills)?
 |  |  |  |
| 1. Do I engage in seminars and group meetings?
 |  |  |  |
| 1. Do I keep on top of the literature?
 |  |  |  |
| **Attendance:** m. Do I put in the time required for my project to succeed?  |  |  |  |
| n. Does I take breaks at appropriate times? |  |  |  |
| o. Has there been any significant change in attendance? |  |  |  |
| **Team accountability:**p. Do I take leadership to help solve lab issues, help others and improve lab processes when my work is done? |  |  |  |
| q. Am I a dependable team member (do I meet deadlines, submit work without obvious oversights, am I punctual)? |  |  |  |
| r. Do I consider and act upon suggestions about changes in work procedures? |  |  |  |
| s. Am I able to identify and solve problems within my scope of authority? |  |  |  |
| **Supervision (if applicable)**t. Do I set goals and evaluate the students I mentor? |  |  |  |
| u. Do I help students develop their independence? |  |  |  |
| **Overall Performance** |  |  |  |

**Significant accomplishments since last review**:

**Unusual obstacles since last review**:

**DEVELOPMENT DISCUSSIONS**

1. Specific recommendations for development and improvement.
2. Actions to be taken by student/advisor.