

Shared Expectations Document Template

The goal of the Shared Expectations Document (SED) is to function as a tool to help students and their advisors have better, stronger mentoring relationships by setting standards for the roles played by both the advisor and the student during a student's tenure in the program. This template provides a list of important points for consideration in forming an SED. A more comprehensive guide toward thinking about such a document is available from the Duke Nicholas School of Environment (<https://duke.box.com/s/n0kogbt6n6hbnopbhe6vdlnh6obd9tbb>), and a Chemistry Department example can be found here: <https://duke.box.com/s/8u4lj4ro6lkmco7lijdqvui83fabjdf>

Source: <https://rackham.umich.edu/downloads/student-mentoring-handbook.pdf>

Developing Shared Expectations for Graduate Students

1. Communication and opportunities for feedback:

- a. What is the best way/technology to contact each other?
- b. What is the appropriate time frame to expect a response?
- c. In what form and how often can the student expect to receive feedback regarding overall progress, research activities, etc.?

2. Student's role on project:

- a. Describe student's primary area(s) of responsibility and expectations (e.g., reading peer-reviewed literature, in-lab working hours, etc.).
- b. For students that just joined a lab:
 - Describe a process for finding a project.
 - What input from the PI can the student expect?
 - What is the expected time frame to find a project?
- c. What type of experimentations/work students will be responsible for? e.g., synthesis, processing, instrumental, computational, etc. How should a new student become trained on these techniques?
- d. Could students complete/perform research by themselves, or do they need one-on-one mentoring from senior students or the PI?
- e. Will the students need to request training from outside of the lab?
- f. Will students develop the experimentations by themselves, or will there be laid out/designed plans available?
- g. Describe the expectations for lab notebooks/data storage. What platform? How should it be shared/exported upon graduation?

3. PI's role on project:

- a. What are the PI's specific roles on the project?

4. Participation in group meetings (if relevant):

- a. How often does a student need to present his/her research update?
- b. What does this participation look like? Full 40-min talk or quick 10 min research update?

5. Tentative papers on which student will be an author or co-author/patent inventorship:

- a. Discuss disciplinary norms around authorship; list the papers and the likely order of student's authorship, e.g., first, second, etc.
- b. What are the requirements to be a co-author on a paper?
- c. Is it worth sharing with the group about on-going manuscript preparation to avoid any unintentional exclusion of any student being a co-author?
- d. Discuss how the patent inventorship is determined.

6. Professional meeting(s) that the student will attend and dates:

- a. What funding is available to attend these meetings?
- b. Describe the requirements for attending a professional meeting (e.g., presentation).

7. Networking opportunities:

- a. Discuss additional opportunities to network (e.g., meeting with seminar speakers, etc.)

8. Time away from campus:

- a. Discuss expected working hours.
- b. Discuss expectations regarding vacations and time away from campus and how best to plan for them.
- c. What is the time frame for notification regarding anticipated absences?

9. Funding:

- a. Discuss the funding model and plans for future funding (e.g., internal and external fellowships, including RMF funding, training grants, GSI, GSRA, GSSA.).
- b. Discuss any uncertainty in future sources of funding, and contingencies.

10. Completion of programmatic milestones and other milestones (as applicable):

- a. What can the student expect the PI to do before these exams?
- b. What does the PI expect from the student in preparation? Are you expected to maintain typical work hours on top of preparing for these milestone exams?

11. Target semester defense and graduation:

- a. What is expected from the PI for graduating beyond typical program requirements?

12. Professional goals:

- a. Identify short-term and long-term goals and discuss any steps/ resources/training necessary to accomplish these goals.

- b. Discuss if there is any activity outside lab that the student is interested in exploring.

- C. What is expected from the PI post-graduation?

13. Skill development:

Identify the skills and abilities that the student will focus on developing during the upcoming year. These could be academic, research, or professional skills, as well as additional training experiences such as workshops or internships.

14. Other areas: List here any other areas of understanding between the student and mentor regarding working relationship during the student's tenure.