**Managing Up Checklist**

Mentees can manage up their workload and project management responsibilities using the following checklist developed by Judy Zerzan, MD, MPH.

Use this checklist over the course of your mentoring individually, or in direct collaboration with your mentor. Remember, those no pressure to complete every checkbox – focus on what matters most to your mentorship!

**Step 1: Getting Ready**

[ ]  Clarify your values

[ ]  Identify your work style and habits

[ ]  Identify knowledge and skill gaps (personal, professional development, skill development, public health-specific interests)

***Notes***:

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**Step 2: Finding a Mentor (or Two)**

[ ]  Meet with people I know

[ ]  Get recommendations

[ ]  Ask the people I meet with who else they recommend

[ ]  Be persistent in seeking out one or more mentors

[ ]  Find multiple mentors, both junior and senior people

***Notes***:

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**Step 3: Determining Your Match**

*The mentor(s) that I have met with…*

[ ]  Provide me with psychosocial support and understand (or are willing to learn about) multicultural perspectives

[ ]  Is available and accessible

[ ]  Provide opportunities and encourage me to take risks

[ ]  Helps me develop my own agenda

[ ]  Has prior mentoring experience

***Notes***:

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**Step 4: Meeting for the First Time**

[ ]  Tell my mentor how he/she/they have already helped me

[ ]  Share my background, values, and needs

[ ]  Send a thank you e-mail after the meeting

***Notes***:

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**Step 5: Cultivating Mentorship**

[ ]  Agree on structure and objectives of mentorship

[ ]  Plan and set meeting agendas

[ ]  Ask questions

[ ]  Listen actively

[ ]  Follow through on assigned tasks

[ ]  Ask for feedback

[ ]  *Manage up* – set goals and expectations, be responsive and flexible

***Notes***:

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**Step 6: Winding Down**

[ ]  Discuss when to end the mentorship

[ ]  Discuss post-mentorship plans

[ ]  Discuss future mentoring opportunities

***Notes***:

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