**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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