

Sponsored Research Training Program

Initial Meeting Template

Mentor: Central Office Administrator

Mentee: Departmental Administrator

Suggested Meeting Length: 1 Hour

Purpose: The purpose of the initial meeting between mentor and mentee is to begin building the mentor-mentee relationship and to set parameters around the mentoring relationship.

Activities: The following are recommended to be discussed at the initial meeting:

- The mentee's goals. The mentee should come prepared to discuss outcomes s/he would like to achieve over the course of the upcoming 6 months. Examples in a COA as mentor and DA as mentee relationship may include:
 - Know about the role of central offices (SRA, ORPA, RIA, CEFR, OAC, or other) in the grant life cycle.
 - Tips for successful relationship building with different central offices.
 - Tips for successful relationship building with sponsors.
 - What types of things central offices are looking for during their routine reviews?
 - Building awareness of sponsored Research financial management, compliance and billing.
 - Submitting interim and final financial reports.
 - Learn how various central offices interact with each other.
- The mentor's goals. The mentor may enter into the mentoring relationship with the intent of relationship building and/or expanding his/her professional network, enhancing his/her career, or a variety of other reasons.
- Develop a formal meeting schedule. The time commitment for the formal meeting schedule is expected to be 1 hour per month, either as a 1-hour monthly meeting, a 30-minute biweekly meeting, or similar. The meeting schedule should be submitted to the Steering Committee within one month from match.
- Establish parameters around informal check-ins. It is expected that the mentor will serve in a limited "on call" capacity to the mentee. In addition, informal meetings such as attending on-campus training sessions or grabbing lunch/coffee together are highly encouraged.
- Develop an action plan of meeting the established goals, including the mentee's preferred learning style(s). Some mentees will prefer to listen to the mentor discuss a question, while others will prefer to watch the mentor perform a task. Everyone learns differently, so be sure to take into account the individual preferences of the mentee.

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Activities: The following are recommended to be discussed at the initial meeting:

- The mentee's goals. The mentee should come prepared to discuss outcomes s/he would like to achieve over the course of the upcoming 6 months. Examples in a DA as mentor and COA as mentee relationship may include:
 - o Tips for successful relationship building with PIs
 - o Learning about the process of working directly with PIs to gather proposal submission documents
 - o Understanding the process of creating a funding proposal record in Princeton ERA
 - o Building awareness of departmental financial management, including developing and maintaining projections, and discussing routine monthly / quarterly processes
 - o Becoming familiar with the departmental administrators a grants manager interacts with and how these roles support sponsored research directly or indirectly
 - o How to apply University policies in a departmental setting
 - o Understanding academic departmental culture
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- The mentee's goals. The mentee should come prepared to discuss outcomes s/he would like to achieve over the course of the upcoming 6 months. Examples may include:
 - o Tips for successful relationship building with PIs
 - o Learning about the process of working directly with PIs to gather proposal submission documents
 - o Understanding the process of creating a funding proposal record in Princeton ERA
 - o Building awareness of departmental financial management and discussing routine monthly / quarterly processes
 - o Learning how to manage a PI's portfolio including: how to discuss student/group support plans, how to use/leverage non-sponsored funds, when to recommend requesting a no cost extension, and projections.
 - o Becoming familiar with the departmental administrators a grants manager interacts with and how these roles support sponsored research directly or indirectly
- The mentor's goals. The mentor may enter into the mentoring relationship with the intent of relationship building and/or expanding his/her professional network, enhancing his/her career, or a variety of other reasons.
- Develop a formal meeting schedule. The time commitment for the formal meeting schedule is expected to be 1 hour per month, either as a 1-hour monthly meeting, a 30-minute biweekly meeting, or similar. The meeting schedule should be submitted to the Steering Committee within one month from match.
- Establish parameters around informal check-ins. It is expected that the mentor will serve in a reasonable "on call" capacity to the mentee. In addition, informal meetings such as attending on-campus training sessions or grabbing lunch/coffee together are highly encouraged.
- Develop an action plan of meeting the established goals, including the mentee's preferred learning style(s). Some mentees will prefer to listen to the mentor discuss a question, while others will prefer to watch the mentor perform a task. Everyone learns differently, so be sure to take into account the individual preferences of the mentee.