



## Advisee/Adviser or Mentor Checklist

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## Overview

The purpose of this Advisee and Adviser Checklist is to align expectations and to discuss goals and parameters at the beginning of a Grad Student's program. This template can be altered to meet individual needs — for example, philosophies, personalities, the department's policies and the home discipline's norms. The Checklist should be re-visited *at least* annually to ensure continued alignment as well as to accommodate major changes, for example, a change in circumstances, expectations or adviser.

The Advisee is the graduate student, and the Adviser is the faculty member *formally* assigned by the program or unit to assist the Advisee in selecting coursework and navigating the expectations of the graduate program.

## Mission

The intent of this agreement is to foster understanding between Advisers and Advisees, thereby creating an environment for graduate students in which they feel supported and prepared to become a professional and/or scholar. Graduate school and academia should be a place to learn ethical standards in the pursuit of creating new knowledge. Herein, is an opportunity to grow and learn.

## Building a Mentorship Network

To build a supportive environment, an Advisee may also select other faculty and students **in and outside ComArts** to be **mentors** who will help the Advisee gain knowledge in select areas; these mentors, however, are not bound by this Checklist. If an adviser doesn't have the answer to a question, Advisees, you are encouraged to reach out for answers from other faculty or graduate students in your program. Having peer mentors can help new students ease the transition to graduate school.

## Changing Advisers/Advisees

Advisees and Advisers, we understand goals, interests and other factors change. At any stage, know that you may ask the Grad Director of your unit or program to change an advisee or adviser.

- **IMPORTANT:** If you are a graduate student who is thinking of switching advisers please be sure to notify all parties (former adviser, current adviser, and graduate director) of changes. If you need assistance in communicating the changes, contact the graduate director.





## In case conflicts need to be resolved ...

If conflicts or issues arise between Advisers and Advisees, please contact the Grad Director of your program, your unit Chair/Director or any other ComArtSci administrators – the Graduate Studies Dean, DEI Director or Human Resources Director – who can address the situation.

## MSU's Mandatory Reporting, BTAT and Confidentiality Policies

Before reviewing the checklist, the adviser and advisee should also review below MSU's policies created to ensure the safety of the community and to also assist those in crises:

- ❑ Unless designated as a confidential source, employees are obligated to report sexual harassment, sexual violence, sexual misconduct, stalking, and relationship violence that are observed in university-sponsored events or learned as an employee at MSU (<https://civilrights.msu.edu/policies/index.html>)
- ❑ In an emergency where student behaviors present an imminent risk to the health and safety of the individual or others, employees must call 911. Even in a non-emergency, in which students display emotional distress or behavioral issues, employees can call MSU Police Department's non-emergency line at 517-355-2221 and/or report concerns to the MSU Behavioral Threat Assessment Team via the online reporting form at <http://btat.msu.edu/referral-form/>
- ❑ Information that could affect a student's academic standing or progress is not confidential and may be shared with other faculty or administrators on a need-to-know basis.





## Checklist

The following checklist is long and not all of the goals may apply. However, many do. This is a tool to start and continue conversations between Advisers and Advisees. See the Appendix for an example of an email to send your Adviser to request a meeting to complete the Checklist.

Goals	Notes
<input type="checkbox"/> Student's <u>short-term goals</u> over the next year	
<input type="checkbox"/> Advising needed to achieve these goals	
<input type="checkbox"/> Student's <i>long-term goals (i.e., goals for their career post-graduate school)</i>	
<input type="checkbox"/> Advising needed to achieve long-term goals	
<input type="checkbox"/> Adviser's <u>short- and long-term goals</u> for student	
Research	Notes
<input type="checkbox"/> Specific skills student is expected to learn from research work with the adviser (e.g. oral/written skills, grant writing, lab management, Institutional Review Boards, ethics codes, disclosures, copyrights, study design, literature review, hypothesis testing, data collection, data analysis and interpretation, etc.)	
<input type="checkbox"/> Expected participation in research work, outside of RA-ship duties, including who will be monitoring, evaluating and communicating with the student ( <i>e.g., lab responsibilities, hours, vacations/time off, lab policies, checking in on hours worked</i> )?	
<input type="checkbox"/> Expected interaction with other team members such as faculty and other students.	
<input type="checkbox"/> If student is engaged in multiple projects, the adviser and advisee should discuss which project should be prioritized.	





<input type="checkbox"/> Authorship expectations ( <i>e.g., criteria for authorship, authorship order and duties, discipline norms</i> )	
<input type="checkbox"/> Adviser and student responsibility for the quality of manuscripts and presentations, including expectations around reviewing drafts	
<input type="checkbox"/> Expectations around when and where student research is presented/published. Specifically, advisers and advisees should discuss the quality of journals versus spam, open-access publishing requests that require authors to pay a publishing fee.	
<input type="checkbox"/> Articulate clearly who owns the research data and creative work, as a function of who collects the data, analyzes it, <a href="#">employment status of the student</a> , etc	
<b>Milestones and Coursework</b>	<b>Notes</b>
<input type="checkbox"/> Timing of major milestones and other program activities ( <i>e.g., practicum, externships, internships, comprehensive exams, proposals, thesis, dissertation, defense, graduation</i> ). It will be useful to create a table of critical dates. See the Appendix for an example of a table.	
<input type="checkbox"/> It will also be useful to use the Graduate Handbook to discuss the requirements and preparation for each milestone, especially the practicum and comp exam.	
<input type="checkbox"/> Responsibility for the quality of theses and dissertations. On major milestone projects, agree on a plan for the adviser to provide feedback and the advisee to make the suggested revisions.	
<input type="checkbox"/> Adviser input into membership on student committees ( <i>e.g., thesis committee, comprehensive exam/guidance committee</i> ) and non-lab activities ( <i>e.g., coursework, practicum, consultation/working with other research/industry groups</i> )	





Adviser/Advisee Styles	Notes
<input type="checkbox"/> Adviser's/Advisee's conceptualization of roles ( <i>e.g., a guide, a teacher/trainer, an advocate, giver of emotional support, colleague, friend, boss/employee, etc.</i> ) See Resource page for types of Mentor/Trainee relationships.	
<input type="checkbox"/> As a prompt to discuss communication styles, the Adviser/Advisee are encouraged to take and review results of this personality test: <a href="https://www.16personalities.com">https://www.16personalities.com</a>	
<input type="checkbox"/> Adviser's areas of expertise and identification of additional guidance needed from other advisers/faculty members/professionals ( <i>be sure to discuss whose responsibility it is to seek out additional guidance, if needed</i> )	
<input type="checkbox"/> Expected duration of the adviser/advisee relationship	
<input type="checkbox"/> Procedures for conflict resolution for adviser/advisee Note: Students should be able to report dissatisfaction with aspects of the relationship without negative impact from the adviser.	
Funding	Notes
<input type="checkbox"/> Expectations for student funding <u>this year</u> ( <i>e.g., RA/TA, student fellowship/training grant</i> )	
<input type="checkbox"/> General expectations for funding for the student's time in the program ( <i>i.e., RA/TA, fellowships/grants/scholarships</i> )	
<input type="checkbox"/> Expectations for funding of student research and independent projects	
<input type="checkbox"/> Expectations for funding conference/workshop travel, registration, software, etc.	





Professional Development	Notes
<input type="checkbox"/> Opportunities for professional development beyond the standard program offerings and training	
<input type="checkbox"/> Ethical, legal, and professional standards the student should learn	
<input type="checkbox"/> Getting a job, prepping for the job talk and process, letters of rec., building networks	
Communication	Notes
<input type="checkbox"/> Communication style and timing ( <i>email response time, texting/calling, office drop-ins</i> )	
<input type="checkbox"/> Meetings ( <i>frequency, duration, location, agenda required?</i> )	
<input type="checkbox"/> Responsibility for initiating check-ins and updating progress for data analyses, manuscripts, conference posters/presentations, etc.	
Other	Notes
<input type="checkbox"/> Additional areas to discuss:	





## Appendix

### Foundational Values

#### for Graduate Student and Faculty Mentoring Relationships at MSU

Effective mentoring relationships are formed and sustained through principles of reciprocity and mutual responsibility. Mentors and mentees should respect one another both as researchers/scholars/creative practitioners and as individuals. That respect is formed through a shared commitment to scientific, creative and professional excellence, and a recognition of these common values:

- **Commitment to respect and care**
  - Establishing a relationship based on trust and open communication
  - Engaging in ways that are respectful and culturally responsive
  - Actively promoting an environment of civility
  - Using inclusive and non-discriminatory language
- **Commitment to professionalism, ethics, and integrity**
  - Communicating regularly about expectations in the graduate degree program in the disciplinary field.
  - Promoting the highest standards of integrity in research, scholarship, and creative activities
  - Engaging in continuing professional development in mentoring skills
- **Commitment to the professional and personal growth and independence of the student**
  - Talking with students about their interests in a range of career paths
  - Encouraging and supporting career exploration and professional development
  - Supporting mental and physical health

#### Example of an email graduate Students could use to request a meeting w/ their adviser to complete the Checklist

Dear Professor,

May I meet w/ you virtually or in person to complete the "[Adviser/Advisee Checklist](#)" that I received from our Graduate Studies Director?

The meeting would take at least 30 minutes. Before we review the Checklist, I'd like to learn more about your professional background, specifically:

- Why did you choose the schools you attended?
- How did you become interested in your research area?
- Would you share what you learned from your advisers and mentors while you were a grad student?

Thank you in advance for your time

Regards,

Grad Student Name





## Example of an MA milestone table from JRN

Semester	Courses	MA Project/Thesis	Internship/Job Search	Notes
Spring 2021	JRN 801, JRN 492 & JRN 821			
Summer 2021				
Fall 2021	JRN 802, JRN 804 & JRN 810	Select MA Committee. Submit and defend MA proposal. Enroll in JRN 896	In December, start applying for internships for Summer 2022.	
Spring 2022	JRN 413, JRN 805 & JRN 806	Work on MA project		
Summer 2022		Complete MA project. Defend. Present at MAven Hour.		At the beginning of the semester apply for graduation.
Fall 2022				





## Suggested Timetable for the I&M Ph.D. Program

### 1<sup>st</sup> Year

#### First Semester

- Engage adviser and other potential mentors with the adviser/Advisee Checklist.
- Consider setting up weekly or biweekly with your adviser. This time can be used to check-in, consider future classes to take, discuss department or program research teams, learn how to manage the program, etc.
- When working on papers for classes, be sure to think about what you want to study and work your ideas into a paper proposal. This is a great topic to brainstorm with your adviser.

#### Second Semester

- These are great topics to discuss with your adviser.
  - Have you joined a research team?
  - Are you able to transpose first semester papers into conference presentations?
  - What about collecting data for any first semester papers?
- You've now met a number of professors. Consider which ones you might like on your comps/dissertation committee. Be sure to reach out to them via email or in person. Inform your adviser of who you'd like to have on your committee to make sure personalities don't clash.
- Consider updating your CV with service information and any TA/RA appointments.
- Start an ORCID and Google Scholar profile.

### 2nd Year

#### First Semester

- This is the time you might consider changing advisers, if you find the relationship isn't working. Remember you can change advisers at ANY time!
- When working on papers for classes, continue to think about what you want to study and work your ideas into class papers.
- If you haven't prepared a paper(s) to be peer-reviewed or presented at conferences, consider talking to your adviser about how to accomplish this milestone.

#### Second Semester

- You may be close to finishing your required class list.
- If you haven't finalized your comps/dissertation committee, now's the time!
- Consider updating your CV with service information and any TA/RA appointments.





### **3rd Year**

#### **First Semester**

- You may be taking your last required course.
- This is the year for comps. You should finalize your reading list with your adviser and have a committee meeting to go over it with your professors as well as meeting with them one-on-one about their expectations. Discuss with your adviser/committee how many questions you want and what shape your comps will take (over several weeks or several days etc.).

#### **Second Semester**

- This is the time to take your comps and possibly work on your dissertation proposal. This is something you should be discussing with your adviser.
- Consider updating your CV with service information and any TA/RA appointments.

### **4th Year**

#### **First Semester**

- This semester, I&M students are typically on the job market while also working on the dissertation.

#### **Second Semester**

- Hopefully, this is your last semester. A timetable to complete and defend your dissertation should be discussed with your adviser.

**Please note:** Everyone moves at their own pace. Some students may have 5-year fellowships. So, this plan may be expanded. Some students may be able to transfer their master's credits. This plan may be too long for them. It's important to sit down and discuss these details with your adviser or someone you trust in academia.





## Resources

Kononova, Anastasia (2021). Responsible Conduct of Research, Scholarship, and Creative Activities. [Mentor/Trainee Relationships PowerPoint](#) – permission granted to modify presentation from MSU's Graduate School (2010) <http://grad.msu.edu/>

The Graduate School. (2021) [Mentoring](#). Optimizing Research Mentoring Relationships – To Promote Inclusive Excellence in Graduate Education at MSU. Research:

- [Identifying and Aligning Expectations in a Mentoring Relationship \(PDF\)](https://doi-org.proxy1.cl.msu.edu/10.1111/j.1752-8062.2011.00356.x) (from: <https://doi-org.proxy1.cl.msu.edu/10.1111/j.1752-8062.2011.00356.x>)
- [Ten Simple Rules for Developing a Mentor-Mentee Expectations Document \(PDF\)](https://journals.plos.org/ploscompbiol/article?id=10.1371/journal.pcbi.100570) (from: <https://journals.plos.org/ploscompbiol/article?id=10.1371/journal.pcbi.100570>)

