

Developing Shared Expectations¹

(It is recommended that the advisor and student revisit these questions annually.)

Advisor: _____

Student: _____

Timeline

1. How many semesters of funding did the department offer the student during admission?
What is the target semester for defense and graduation?
2. What is the expected timeline for PhD milestones?

Milestones	Year 1		Year 2		Year 3		Year 4		Year 5		Year 6	
	FA	SP	FA	SP	FA	SP	FA	SP	FA	SP	FA	SP
Comps												
Prelim												
Thesis												

Note: spring semester includes the summer, but feel free to use an additional column for summer

Other milestones might include: conference presentation, preprint completion, peer-review publication, thesis draft, etc.

3. What are the expectations regarding vacations and time away from campus? What is the timeframe for notification regarding anticipated absences?

Research

4. What will be the process for finding a thesis problem?
5. If a line of research has been chosen, what might the first paper produced contain (ideally and minimally)?
6. Within the specific area of math, what are the norms around paper authorship?

Nuts and Bolts

7. What is the best way/technology to get a hold of each other? What is the appropriate timeframe to expect a response?
8. What is the planned structure for regular meetings?
9. What are the student's primary areas of responsibility and expectations (e.g. reading peer-reviewed literature, hours spent on research, attending seminars, etc.)?

¹ Based on the graduate mentorship document from the University of Michigan:
<https://rackham.umich.edu/downloads/how-to-mentor-graduate-students.pdf>

10. Are there research group meetings? If so, what are the expectations around the student's attendance and participation?
11. Who might sit on the student's prelim/defense committee? (It may make sense for the student to do reading courses with other members of their potential committee.)

Feedback

12. In what form and how often can the student expect to receive feedback regarding overall progress, research activities, etc.?
13. For feedback on written documents (paper drafts, research statement, etc.), how much lead time should be given to the advisor?

Professional Development

14. What are the long-term career goals of the student? What are some steps/resources/training necessary to accomplish these goals?
15. How will the advisor be involved in guiding the student toward these goals? What other resources and mentors might the student seek out?
16. Does the student have training that may provide flexibility in future career decisions? (e.g. programming experience, statistics knowledge. It may be advisable for students to take courses in these topics.)
17. What advice and concerns do each of you have regarding the balance between research and teaching? How does this align with the student's future career goals?
18. Identify some 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.
19. What funding opportunities are available for students to attend conferences and other professional development activities? Are there fellowships that the students want/could apply for?

Other

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