Virtual/Remote Mentoring Guide

Resources for Mentors in Educational and Research Participation Programs

Oak Ridge Institute for Science and Education
June 2020

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Preface

Thank you for agreeing to mentor an ORISE participant in a remote environment! Your commitment to the development of participants despite the challenge of remote mentorship is to be commended. This guide is provided to help you navigate aspects of mentoring that may be more important than ever and/or that may need to be modified for a remote experience. This guide also includes a list of Frequently Asked Questions (FAQ) in Appendix A.

Do not hesitate to reach out to your ORISE contact with any questions regarding your program and the transition to virtual appointments. Together, we will continue to provide best-in-class experiences for participants in new virtual spaces.

As you go through this document, keep in mind that it is important to focus on the holistic participant experience. The human and empathetic part of being a mentor is just as important as the technical interaction. Take care to ensure the health, safety and mental well-being of the participant are being considered in addition to making sure the participant is achieving the learning objectives.

Again, your willingness to serve as a mentor is appreciated. You are providing a much-needed and exciting opportunity for participants during a crucial time. In making these remote experiences available to participants, you are strengthening our collective reputation and building strong relationships with our future workforce.
I. Preparing for Your Participant – Before Your Participant Begins

1. Equipment for remote participation

Identify the equipment and resources your participant will need to participate remotely and to complete any program requirements (Equipment Checklist in Appendix A). Work with your group administrator or others, such as your information technology (IT) representative, for ordering needs and configurations. Make sure the participant is notified of delivery dates and knows whom to contact if items do not arrive as expected. Consult the Pre-arrival section of the Participant Onboarding Checklist (Appendix A) and confirm that all items are completed. Be aware that the ORISE program may also provide resources for participants to ensure a successful remote participation.

2. Identify project background materials and begin planning

Remote appointments should provide enough learning, enrichment, and professional development activities for participants to fulfill their program requirements. Creating a full-time schedule of remote participation can be challenging so consider thinking outside of the assigned project. Here are some example tasks for supplemental activities that still fulfill a high-quality experience:

- Have your participant pull together text for a literature review pertinent to the project
- Have your participant complete online/lab offered relevant class, if funding permits
- Collaborate with your team to identify other activities in support of related projects

Prior to onboarding, identify essential and supplemental project background materials that will be helpful as your participant begins their project assignments. Consider sharing reading material, project details, research examples, related videos, etc., to introduce and acclimate your participant to the project. Make sure your participant knows that reviewing these materials prior to their start date is optional.

Consult with your orientation/onboarding team to verify the required trainings that will be completed at orientation and during the appointment. Work with your training team to add any training needed for the participant’s project. For training that is typically held in-person, work with the training team to identify alternatives for a remote participation.

Remote participation will result in more independent time for your participant so it is critical to identify specific goals and learning objectives, especially in the beginning of the appointment. You may want to begin to outline week-by-week goals for your participant. The Participant Plan Template is a useful resource to guide the creation of a week-by-week plan for your participant. However, avoid the temptation to plan out the entire appointment in advance as the plan should be a collaborative document that you develop and revisit often with your participant.

3. Identify and prepare a remote mentoring team

For most participants this will be their first remote experience and they may need more coaching and guidance than would be expected if they were physically “right down the hall”. We
suggest that you form a mentoring team, including other members of your own team and other office/division staff, to ensure that your participant has consistent support, regular check-ins, and a variety of people with whom to interact remotely. One suggestion would be to identify an early career member of your team who can serve as a “peer mentor” for your participant. The role of a peer mentor is to help your participant adjust to and feel included in the culture of the facility, and to address the day-to-day questions and concerns your participant might have about participating with your team. Review the Peer Mentor Guide with the peer mentor to ensure they understand what is expected, and write an email introduction to connect the peer mentor and your participant.

Schedule a meeting or meetings early during the first week of your participant’s experience to introduce your participant to the mentoring team, other group or project members, your team and group leads, and other participants in the group. You may want to collect brief introductory biographies and pictures of the mentoring and group team members and provide them to your participant for reference.

As with onsite appointments, an emergency point of contact needs to be identified in case of your absence or unavailability. Appoint someone on your team or in your division to be your back-up to the participant. Ideally, introduce your participant to the selected person within the first week of the appointment.

Refer to the Quick Tips on Effective Remote Mentoring and Community Building resources for further details.

4. Reach out and begin building relationship

As the start date for the appointment approaches, you can reach out via email to begin building a relationship with your participant and preparing them to join the team. Provide your contact information and your preferred communication methods. If you are comfortable communicating via text or messaging apps, let your participant know that you may be contacted that way.

Confirm the participant’s start and end dates. If needed, check with the appropriate staff within your organization regarding how your participant will connect for orientation and onboarding. Find out what time your participant will be available on their first day and let your participant know how and when you will remotely meet with them to address questions and make plans for the week.

Your manager or a mentor figure who manages employees would likely be willing to share the best practices for managing remotely that they have picked up on-the-job recently. Before your participant arrives, try to schedule a conversation with your manager or mentor to gain their insights on how best to manage your participant remotely. Some questions you may ask include:

- How best to maintain engagement remotely?
- How best to give feedback remotely?
- Do they have any experience managing a participant who has little familiarity with a team and project?
II. Getting Off to a Good Start

This may be your participant’s first professional experience and probably the first remote experience as well. Share with your participant what your experience with remote working has been like. This can be a good way to normalize the experience (e.g., “At first I felt isolated from my colleagues”) and share any strategies you have used to optimize your remote working experience (e.g., “Identifying my priorities each morning and setting a schedule has helped me stay productive and ensure milestones are met”).

1. Participant onboarding

Below are tasks that need to be completed to help your participant through the first week in a remote appointment. Some of these tasks will be covered during participant orientation, but reinforcement and review will help the participant retain the information. When appropriate, you may ask a group administrator or another member of your mentoring team to take care of some tasks.

- **First Day/Week**
  If you have been provided with an onboarding checklist, make sure that all items on the list for the first day/week are addressed by you, your group administrator, or a member of your group or mentoring team.

- **Schedules**
  Discuss scheduling options with your participant; time zones should be taken into consideration. Ensure that the participant understands that the participation is full- or part-time and discuss the expected hours of participation during the appointment.

- **Environmental, safety, and health training and other required training**
  Determine the approximate time needed to complete each training module and help your participant develop a schedule to complete all required training within a reasonable time. Reinforce the importance of safety even in their remote environment.

- **Reinforce Remote Operations Security (OPSEC)**
  Review with your participant the appropriate use of government equipment/computer accounts. Share examples of authorized and unauthorized use of government equipment/computer accounts. The participant may be participating in a shared space so help them plan how they will protect sensitive information, if needed, and make sure they know what can and cannot be shared. Remind them to be mindful of documents on their screen, what may be post on social media, and to use headphones when in meetings or talking with colleagues. Refer to the [OPSEC Telework Guide](#Appendix A) for additional information. Consult your Facility Cyber Security office for facility-specific guidelines.

- **Resources**
  A suggested list of important [Facility Websites and Links](#Appendix A) and contacts has been provided in Appendix A of this guide. Review and update the list with your project and facility websites/links/contacts and add any others that are not included.

- **Remote Participant Agreements**
  Check with the appropriate staff within your organization about facility-specific documents/agreements the participant is required to approve and sign. Please review and reinforce any signed legal agreement(s) to ensure the participant is fully aware of the expectations and consequences they have agreed to. Answer any questions the participant may have regarding the agreement.
Additionally, you and your participant should document in writing your shared expectations for the remote experience. While not legally binding, such a document can contribute to the success of the appointment. In addition, should problems arise during the appointment, the document may serve both to engage your participant in discussion and to aid discussions with ORISE on next steps. A template for a Mentor-Participant Agreement is included in Appendix A.

2. Establish remote communication

During the first week take the time to establish a strong foundation of communication for your participant with your mentoring and project teams. Include your manager and facility leadership, when appropriate. This will allow your participant to experience a fully engaged remote experience with your facility. Your participant will learn some incredible skills during their remote appointment, and this is the time to employ strong communication skills that build trust using the following guidelines.

- **Take advantage of teleworking technology**
  Fortunately, today’s technology makes remote collaboration easier. Make sure participants are comfortable with any approved online collaboration tools they need to use. In lieu of being able to sit down next to each other at a computer, lean on utilities like screen sharing to facilitate collaboration and aid discussions. Let your participants know whom to contact if they experience problems using or accessing any online collaboration tools. If needed, verify which online collaboration tools your facility has approved.

- **Introductions**
  Circumstances vary among participants. Some participants will be sharing a space with others, others will have access to a private space, some may experience limited internet access, and many will be in a different time zone. Getting to know your participant as soon as possible will be even more important than ever.

  Schedule at least one “get to know you” video chat with your participant in the first week. Ask about their interests, likes, dislikes, educational goals, career goals, hobbies, family, etc. Share about your family, hobbies, career aspirations, education, and professional goals.

  Lead a video meeting to introduce your group and/or project team and share your organization chart. This allows the participant to see where your team fits in the facility. It is important your participant feels like a part of the team. Do this with your mentoring team also. Create opportunities to introduce participants to other participants within the group.

- **Establishing Routines and Setting Expectations**
  Talk to your participant about establishing core hours and a regular schedule. Consider your participant’s time zone and ask if anything may prevent them from following a set schedule. One suggestion would be to establish a six-hour schedule as core hours and then schedule the remainder of their participation time over the core hours based on their needs.

  Establish a cadence and method of regular communications. Let your participant know what to do should something unexpected come up (i.e., illness) and how you will let them know if you will be unavailable during your regular schedule. Confirm that they know whom to
contact when you are not available. Review the Community Building and Guidance on Remote Communication documents (Appendix A) and implement some of the suggestions to help keep your participant connect regularly.

Go over some general remote best practices from Teleworking Etiquette in Appendix A. Remind your participants that they should present a professional image even though they are participating remotely. Have a conversation about proper attire for video meetings and conferences. Mention how the image they share with others represents them as professionals, and therefore they should be mindful of their appearance and workspace background.

Discuss your participant’s workspace. Their workspace should be conducive to a productive environment with as few distractions as possible and that is safe for the participant (remind them to check for tripping hazards, electrical safety, etc.). If your participant is working from home with family members or roommates nearby, remind them to protect sensitive information by using screen blockers, locking their screen when they step away from the keyboard; and not leaving documents where others could see them. Refer to OPSEC Remote Participation Guide in Appendix A for additional points.

- **Plan for successful remote participation**
  Below is a Participation Plan Template that you and your participant may use in collaboration to determine week-by-week goals and tasks for the appointment. The more guidance and structure that the participant has, the easier it will be to keep them and the project on track.

  **Date - Date**

<table>
<thead>
<tr>
<th>Theme(s)</th>
<th>The overall focus of the week (e.g., orientation, planning the project, learning new skills, conducting the experiment, analyzing data, preparing deliverables)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Goals(s)</td>
<td>Specific, Measurable, Attainable, Realistic, and Timely (SMART) goals to accomplish during the week.</td>
</tr>
<tr>
<td>Task(s)</td>
<td>The specific tasks that the participant (or the mentor!) will perform to accomplish the weekly goals.</td>
</tr>
</tbody>
</table>

  Copy the table above as many times as needed to cover the length of the appointment. This is particularly important when mentoring a participant remotely. See Appendix B for more information on SMART Goals.

  You can find general mentoring guidance in Appendix B. Undergraduate Research Expectations and Mentor Expectations include questions to help you and your participant address expectations and questions you might have about mentoring and the participant experience. Sample Mentor-Mentee Expectations can also be found in Appendix B. The Mentor-Participant Agreement (Appendix A) or a similar document can be used to facilitate a conversation between you and your participant to reach a common understanding of
expectations for the appointments. A document to help you deliver FAST Constructive Feedback can also be found in Appendix B.

Above all set and maintain reasonable expectations for your participant and yourself. For example, student participants generally participate in laboratory internships appointments to learn and experience what it is like to do research for a living. Mentors provide a challenging but enjoyable experience that helps participants expand their current skill set. Mentors ideally create an environment where mentees can learn from their own mistakes and successes, as well as lean on the mentor’s experiences. As such, student participant tasks should not be considered critical to the success of the project. Reasonable expectations of delivery and completion of tasks should be maintained without demanding heightened productivity of yourself or your student participant. Appointments on their own are stressful; participating through a remote experience for the first time is even more so. No one should expect masterpieces or flawless execution by either participant or mentor. Break things down into smaller, manageable chunks and set reasonable targets.

- **Ensuring a high-quality learning experience**
  The primary goal of the participant’s experience is for them to feel they are a part of your facility’s community and gain an understanding of the mission, operations, and culture of the program sponsor and your organization. The participant should begin to redefine themselves as part of a team.

Even if you are not offering a research-based experience, the Remote Research Experience Standards in Appendix A may help you develop accepted standards for a high-quality experiences with modifications for remote mentoring.
III. Community Building, Assessing, Readjusting

1. Remote Community Building

Participating remotely requires high levels of independence and discipline and can be isolating even for the most independent individuals. To help your participant combat the isolation they may feel at times, build on the foundation for communication established in Week 1 with additional Community Building (Appendix A) activities.

Invite your participant, and encourage others to invite them, to meetings related to their project or interests. During meetings do not ask participants to take notes, rather allow them to fully engage in the meeting and invite their active participation. Most remote meeting applications provide a way to record so that participants or others can later review the material. Consult the Meeting Check-In Guide (Appendix A) for additional guidance on successful remote meetings.

Provide opportunities to interact with others less formally in a virtual environment. Encourage them to engage in Resource Groups at the facility as well as remote/virtual activities hosted by your organization. Engage your participant by discussing your career pathway and personal experiences; ask the participant about their classes or classes they plan to take; ask about their future plans, etc. When you plan your engagements, include other participant-mentor teams, if possible, within your organization to further develop your relationship and personal connection. Consult the Community Building resource in Appendix A for more ideas.

Establish a plan for regular communication:

- **Daily check-in conversations**
  Participating remotely can leave participants feeling isolated. Mentors and their mentoring teams are encouraged to “check in” with their mentees daily, by phone or video, and have a conversation about their activities. These do not need to be long conversations (15 minutes or less) but are important to ensure connectivity and interaction. If the mentor is not available to do this at certain times, then a delegate should be assigned.

- **Weekly mentor team engagement**
  Weekly, other members of the mentoring team (including the Team Lead or Division Lead) should engage the participant in short conversations – again by phone or video conference – to ensure that they are continuing to receive adequate mentorship and that any challenges associated with teleworking are being addressed.

- **Monthly progress reports**
  Mentors are encouraged to provide short monthly written reports to their manager with the details and progress of their participants. A short template is in the appendix to use as a guide. The intent is to ensure that the proper level of interactions are occurring and being documented.

It’s best to over-communicate with your participants and ensure they have what they need to have a successful experience. If you have doubts or if they go quiet, follow up with them. They do not have other participants next to them to ask questions and they will need to know it is acceptable to ask you questions. Refer to the Warning Signs resource provided in Appendix A. Also please be sure to reach out to the ORISE contact if you have any concerns.
Consider implementing other ideas from the Community Building and Guidance on Remote Communication resources (Appendix A), and ideas that help emulate opportunities that normally occur in a physical environment. For example, several participants might be invited to an “Open Work” meeting in Teams where they can engage with other participants.

2. Ensure participant understands the basics

The learning curve for any appointment is steep but could be even more challenging in a remote environment. Make sure that your participant knows whom to contact for all areas of their appointment engagement. Reiterate or review contacts for the appropriate parties for project concerns, IT needs, peer mentoring support, safety, etc. Keep in mind that your participant may be hesitant to reach out to other parties that they are not comfortable with, so reinforce that you may also be contacted for any of the above issues. Participants should also be directed to contact ORISE for assistance during their appointments. Share your edited version of the Facility Websites and Links document (Appendix A) with the participant and encourage them to add to it.

Appendix B contains additional activities you can use to help your participant. For example, participants new to research may need help developing an understanding of their research project and assessing this understanding over the course of the appointment. Appendix B includes worksheets on Research Group Focus, Research Group Diagram, Reading Scientific Articles, and Creating a Research Outline and Abstract. Even if the program assignments are not research-based, these resources may be helpful to you as you develop a mentoring plan for your participant.

3. Be aware and ready to adjust participant needs

Be mindful of your participant’s needs and adjust your approach accordingly. Your participant completed a remote onboarding, remote orientation, and assigned training during the first week. Check in with your participant on their comfort level with technology usage, project assignments, and other tasks. Additional training may be required if your participant is struggling in any area. Lean on your team, back-up mentor, and other mentor-participant pairs to assist in acclimating your participant after week one. As a general warning sign, an uncomfortable or unsure participant might be quiet. Pay special attention if your participant’s communication with you decreases at any time during the appointment. This may be a silent call for help that they do not understand a project component or technology tool. Review the Warning Signs document in Appendix A for other red flags.

4. Providing constructive feedback remotely

Participating remotely creates some unique challenges for providing feedback. Specifically, it is critical that you pick the right medium for providing your feedback – try to avoid giving criticism, even constructive criticism, in writing. It can be difficult to interpret tone and meaning over email or text. Whenever possible, deliver criticism through one-to-one conversation, preferably with video. Ensure that your participant has privacy while receiving critical feedback. Take opportunities to recognize the successes of your participant in group meetings – this can amplify
the impact of your words and boost your participant’s confidence and self-perception as a researcher/professional. More hints on Delivering Feedback can be found in Appendix A.
IV. Before the End of Experience – Appointment In Progress

1. Deadlines and Program Requirements

It is important to emphasize any established timelines to meet the requirement/deliverables stated in the ORISE letter of appointment. This should be discussed with the participant at the beginning of the appointment to help them prioritize their time. Be mindful of deadlines that may be beyond the participant’s immediate control (i.e., facility or publication tracking approvals) and be sure to aid to the participant as needed.

Encourage your participant to take full advantage of the remote tools provided to help with the development of the deliverables. This includes online courses and videos as well as facility-led professional development offerings, such as How to Develop a Powerful Poster, Scientific Writing, etc. Encourage them to check with ORISE for additional resources. Check with your appropriate staff within your facility as to what workshops are being offered remotely for participants during this time.

Use screen sharing tools to provide timely and constructive feedback on rough drafts. Be mindful of your participant’s experience since participants have varying levels of experience with writing and presenting. Pay special attention to the participants who may need additional guidance or help getting started.

Determine an appropriate check-in process to track the participant’s progress during the appointment and program requirements. Utilize email reminders, remote platforms, and/or written drafts to ensure the deliverables are on track.

2. Engaging participants beyond their project assignments

Engaging with your participant is important in remote mentoring and should now be an established routine. Fostering face-to-face interaction helps create a personal connection, and help them better feel like part of the team. Use these opportunities to build both skills and comradery. Continue to look for and generate ways to involve your participant and other in a virtual/remote community.

Listen, don’t fix. Mentors are not always there to fix problems. Sometimes you are there just to listen and acknowledge the full range of emotions. Let participants know that what they are experiencing is natural and acceptable, and that you are there to listen and provide support. Contact your ORISE contact if you need guidance or assistance in handling a situation.

3. Identify opportunities for your participant to present

When appropriate, provide your participant with opportunities to speak to the team during meetings. Have them begin with a short update or overview of their project and gradually work them into longer presentations as you gauge their comfort level with public speaking. Suggest the participant develop a draft presentation for feedback prior to presentation to the larger group. Generally, a five- to fifteen-minute presentation will help them grow their public speaking skills.
Ongoing assessment

Refer to the Exit Checklist (Appendix A) and review the tasks for completion. Talk with your participant about their learning progress and discuss how they plan to incorporate what they have learned into their deliverables. Be prepared to answer questions and offer guidance (i.e., what information is pertinent/critical to include on the poster, etc.).

- Suggest additional training opportunities (e.g., books, project reports, publications in peer-reviewed journals, conferences, presentations and posters, proposals, involvement in press releases).
- Collect regular status reports.
  Set an expectation that they contact you when they miss a deadline. Be a good example. If you, the mentor, need to miss a deadline, make sure you communicate this to your participant well in advance.
- Set aside time periodically to have a one-to-one conversation with your participant on how the experience is meeting or not meeting their professional goals. If the experience is not meeting your participant’s professional goals, investigate ways that can help better meet that expectation for your participant.

IV. Wrapping-up the Appointment

1. Deliverables

Ensure project/program deliverables are met, including appropriate acknowledgement as stated in the ORISE letter of appointment. Participants are expected to adhere to the existing hosting facility laws, policies, and procedures regarding the dissemination of information. Use online collaborative tools to meet your responsibility of completing the final technical review and ensuring all required approvals of the deliverables.

2. Participant virtual symposium

If possible, consider holding a virtual symposium or other poster/oral presentation opportunity as part of the participant experience. Schedule remote practice sessions between you and the participant, or between participants in your division or group. Offer constructive feedback to the participants. Plan to support your participants during the virtual symposium, if your schedule allows.

3. Equipment

Refer to your Equipment Checklist (Appendix A) or information provided by your IT department and communicate to your participant the protocols for returning equipment. Check that your participant is aware of the expected return date and has the necessary packaging, return labels, and packing list. Work with your group administrator or IT as appropriate to coordinate the return of equipment/resources.

Prior to the appointment end date, review the Remote Participant Agreement or documentation that lists equipment, materials, and other items that must be returned.
4. **Checkout**

Review the checkout items below as your participant approaches the last day of their appointment.

If you have been provided with an exit checklist, make sure that all items on the list for Before End Date and Prior to Exit are addressed by you, your group administrator, or a member of your group or mentoring team. Review and complete the exit checklist together (deliverables, equipment return, etc.). Check with the appropriate staff within your facility for your facility-specific checklist.

- **Required Deliverables**
  Ensure that the participant’s required deliverables are submitted appropriately.

- **Continuation or Termination**
  Before your participant’s appointment ends and based on program policies, determine if your participant will be (1) extending the remote appointment; (2) returning to the appointment at a later date (*add timeframe if applicable*); or (3) terminating the appointment. If you are interested in having your participant extend the remote appointment or return in the future, engage the participant in one-to-one conversations to determine their interest and future plans. Coordinate with the ORISE contact the appropriate extension or termination (exit) paperwork.

- **Mentor and Participant Survey**
  Ensure that both you and your participant have completed any surveys required by the facility and ORISE. Along with your team, provide your participant with feedback.

5. **Staying engaged, post-appointment**

You may choose to continue regular communications with your participant to update them on the progress of the project (especially if the experience resulted in a publication submission).

6. **Communicate with the ORISE contact during wrap-up/exiting process**

Throughout the wrap-up process, communicate with the appropriate staff within your facility and the ORISE contact to verify successful program completion. If you have any questions you may also check the [Frequently Asked Questions (FAQ)](#) document in Appendix A.
Appendix A – Resources and Tools for Remote Mentoring
After reviewing your equipment checklist and determining your participant's equipment and material needs, work with either your IT representative or administrator to complete the packing list of all hardware and materials shipped to your participant.

Your participant should keep the packing list to guide them as they pack and return the items to you or your point of contact.

Engage your ORISE contact to determine if program may reimburse participants for supplies and materials needed for remote participation.
### Packing List

Below is a list of equipment and materials shipped to you for your remote participation. Please initial each item received under “Delivered”. Keep this packing list and use it as a guide when you pack and return all equipment and materials. Please initial each item packed under “Returned” and include this list in your packed materials.

<table>
<thead>
<tr>
<th>Item</th>
<th>Delivered (initials)</th>
<th>Returned (initials)</th>
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<td>6.</td>
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</table>
Participant Onboarding Checklist

Use this resource to help your participant become acclimated to their remote participation. These actions can help facilitate effective onboarding for remote participants.

<table>
<thead>
<tr>
<th>Participant Name</th>
<th>Start Date</th>
<th>Primary Work Location</th>
<th>Group Leader</th>
<th>Peer Mentor</th>
<th>Team Leader</th>
</tr>
</thead>
</table>

Pre-Arrival: **Steps to be completed prior to first day:**

☐ Welcome new participant via phone or video call.
☐ Welcome new participant to their department via email.
☐ Encourage team members to welcome new participant. Share their bio and resume and clearly describe where they fit within the group and outline projects they will support.
☐ Develop a participation plan.
☐ Prepare first day and first week agenda (include time for compliance training; consider time zone)
☐ Identify and select a peer mentor. (See definition section for details)
☐ Verify and arrange for any tools the participant might need (i.e. computer, printer, Wi-Fi needs, office supplies) and grant access to key drives, systems, tools, and platforms. Work with administrator and IT team to determine when hardware will be delivered.
☐ Start clearance process (if applicable).
☐ Other: ______________________________________________________________________

First Day: **Steps to be completed on the first day:**

☐ After Orientation is completed, welcome your participant via virtual call. Make sure to use video and share your screen!

☐ Discuss expectations on:
  ▪ Project assignment
  ▪ Safety
  ▪ Derivative classification and export control review procedures (to be discussed in depth during first week)
  ▪ Schedule (share hours when participant must be available, consider time zone if applicable)
  ▪ Approval for absences
  ▪ Confidentiality

☐ Introduce participant to staff via email or during group meeting via video.
☐ Add new participant to relevant meetings and distribution lists.
☐ Other: ______________________________________________________________________
After Start: Steps to be completed soon after the appointment begins:

☐ Invite participant to virtual events and attend with them (if possible).
☐ Discuss:
  ▪ What will they be doing?
  ▪ What are your goals?
  ▪ What are their goals?
  ▪ What is expected each week of their appointment, including their first milestone deadline
☐ Describe your mentoring style and preferences.
☐ Set up training opportunities.
☐ Ensure required training has been completed.
☐ Schedule daily check-ins to discuss their questions, progress, concerns.
☐ Discuss the missions of the directorate and division.
☐ Discuss roles & responsibilities for the following job titles (Team Leader, Group Leader, PMOD, Division Director, Sector, Peer Mentor, Mentor(s), and Administrator)
☐ Provide overview of online directories and resources (i.e., human resources, benefits).
☐ Discuss releasing information outside of the facility and export control review procedures (provide link to your Information Release (IR) pages).
☐ Discuss major risks and associated controls specific to the new participant.
☐ Other: __________________________________________________________

Definitions:
☐ Peer Mentor: Someone who can help create a positive first impression and accelerate the “time to productivity” of a participant. A peer mentor can provide guidance, answer the participant’s questions about the facility’s environment, and introduce them to others and to the workplace culture in a positive way. Usually, this is someone with a comparable academic level.
☐ Mentor: Someone who can provide guidance, motivation, support, and role modeling. Usually, this is someone with a higher-level job title.
In collaboration with your participant, determine week-by-week milestones and learning objectives for the appointment. Below is a template that you can follow or feel free to create a participation plan of your own.

**Participant Plan Template**

<table>
<thead>
<tr>
<th>Week 1: Date - Date</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Theme(s)</strong></td>
</tr>
<tr>
<td><strong>Goal(s)</strong></td>
</tr>
<tr>
<td><strong>Task(s)</strong></td>
</tr>
</tbody>
</table>

*Source: Adapted from University of Washington Internship Workplan Template*

Copy the above table as many times as you need to reach the end of the appointment!
As a peer mentor, you play a role in supporting the onboarding of participants. You were selected for this important role because of your positive attitude, interpersonal skills, understanding of the work environment, and desire to help others.

When a participant has a peer mentor, they have an additional individual to guide and to help them acclimate to the remote environment. You can help them learn about the culture of the facility, policies and procedures, how to address day-to-day questions or concerns, and much more.

Our shared goal is to integrate the new participant smoothly, so that they feel valued and welcomed. We want to help them accelerate their learning curve and become a contributing member of their team.

To make this process as easy as possible, we’ve suggested a few activities in the table below as a starting point for engagements.

<table>
<thead>
<tr>
<th>Activities</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>Introduce yourself</td>
<td>Set-up a virtual meeting - answer initial questions, provide useful group and facility information</td>
</tr>
<tr>
<td>Help with minor logistics</td>
<td>Provide overview of office practices, meetings, etc.</td>
</tr>
<tr>
<td>Help with tools and resources</td>
<td>Share or demonstrate useful working tools and resources</td>
</tr>
<tr>
<td>Ensure participant has been introduced to team and key contacts</td>
<td>Help participant build their network, so they can be a contributing member of the team</td>
</tr>
<tr>
<td>Help the participant feel like a member of the team</td>
<td><em>Ideas (all virtual!):</em> Set-up a group lunch, coffee break, social events, etc.</td>
</tr>
<tr>
<td>Check-in frequently</td>
<td>Check in at least once a week to see if the participant has any questions; be available for conversations</td>
</tr>
<tr>
<td>Provide awareness</td>
<td>Ensure the participant knows they may come to you with questions about group dynamics, interacting with their mentor, etc., and that you are available to offer your insight, interpretation, and understanding.</td>
</tr>
</tbody>
</table>

We encourage you to meet with the participant’s mentor prior to onboarding to understand any additional expectations of your role. Thank you for helping new participants to a great start!
Quick Tips on Effective Remote Mentoring

Part of being a mentor is guiding an experience and sharing tools or skills, so your participant may grow and thrive in a professional community. When remote mentoring, there are a few key things to keep in mind. Below are tips to ensure a successful remote participation.

Communication: Communicate early and communicate often! Make sure that communication with your participant is frequent and regular. In addition to videoconferencing, send periodic emails to check in, pass on an interesting link, or share a photo. Integrate your participant into your team community and its communication channels.

Collaboration: Work with your participant to set solid expectations and goals for their project. Develop a detailed project plan with deadlines and milestones. Be prepared for slippage, and be willing to revise the plan as necessary, especially at mid-point. Aim to provide an enriching experience.

Credit where due: Remember to acknowledge contributions in public: When your participant completes important project milestones, announce their successes to your team. If you write a report or journal article, make sure that they are acknowledged for their contributions.

Be gentle with criticism: Remember that you are cultivating a long-time contributor. Positive, constructive comments are the most useful as well as the most pleasant to receive.

Offer a realistic view of the team/group/facility: If you want a participant to stick around, you might as well make the experience as realistic as possible. Creating a bubble for the participant takes a lot of effort. Participants need to understand and deal with different organizational dynamics.

Be socially and culturally sensitive: If you and your participant don’t share the same cultural background, ask respectful questions to understand the similarities and differences. Also, make sure to maintain appropriate boundaries in your communications. For example, your participant calling in the middle of the night to ask for relationship advice is not a pleasant situation for anyone; leave those conversations for their college friends.

Evaluation: Keep your participant evaluations objective; base them on your project plan. Make sure your participant hears your evaluations: deliver praise in public and criticism in private.

Professional development: If appropriate, offer written professional recommendations to participants. Your help in career advice, job searches or referrals can be invaluable for a participant.

Say “thank you” often: People like to be thanked for their contributions—publicly and privately. Creating an environment of appreciation makes participants want to keep contributing.

Solicit talks: Recommend that participants present their research/project assignments. If you can, offer to help with designing their talks. If you know people who perform research/work that your participant is interested in, or that your participant would be impressed to be introduced to, take the time to make introductions.
Stay in contact: Many organizations typically sustain themselves through personal connections. When in doubt err on the side of communicating professionally.
Community Building

As mentioned in the remote mentoring guide, participating remotely requires high levels of independence and discipline and at times can feel isolating even for the most independent individuals. Hence, it is important to establish a community for your participant and focus on efforts on building that community.

**Be intentional** - Connect with other mentor-participant teams and establish participant peer support. Find a mentor-participant pair working on related research or projects, or request a list of mentors/participants at your organization. This is an opportunity to increase your participant’s exposure to other mentors and participants at your facility. Set up an introduction meeting during the first week. Encourage your participant to lean on other participants for idea brainstorming, discussion of experience, and as a resource to expand their professional network.

**Be inclusive** - Include your participant in meetings with other members of your team. This allows them to learn about other facets of the project assignments and increase their knowledge base. Ensure your participant has regular remote interactions (may be short) with various members of the team to inform, advise and build community. When appropriate, allow them a voice at meetings by having your participant either update or present their contributions to the project. It is best to start by having them speak or present last.

**Develop a positive relationship** - Share your experience as a student or participant and describe where you are today in your professional life. Provide advice and guidance that will help them grow academically and professionally. Share your plans and availability so there is always trust, accountability, respect and effective communication in your working relationship.

**Encourage and support professional development** - Empower your participant to take ownership of their career. Share information, tools, and resources available for them to use. Share your own experiences regarding how professional development has helped you. Emphasize and encourage their participation in professional development and enrichment activities.

**Lean on your support units within your organization and ORISE** - Connect with your appropriate staff members within your organization and ORISE contact for insight, guidance, or simply to touch base.

Need help with introductions? Have your participant craft an elevator pitch that succinctly describes their academic and professional background and interests. Consider posing the following questions to assist in creating this pitch:

- Have participants answer the question “What are you studying/What did you study?” if it were asked by a non-expert. Limit to one sentence answers.
- Have participants answer the question “What are you studying?/What did you study?” if it were asked by an expert (i.e. a graduate student in your lab, university professor, another mentor, etc.). Limit to one or two sentence answers.
Mentors must be aware that for some participants, this is their first professional experience. You, the mentor, and the facility’s onboarding staff will provide guidance for safe operational security (OPSEC) and cybersecurity practices when while participating remotely. This will be critical for your participant to know especially if they have been issued facility-owned equipment.

While we aren’t sitting at our desks on campus or at the facility, we should all be applying OPSEC and cybersecurity practices to protect the information that we’re participating with. Protecting project-related information that might be Official Use Only (OUO), Controlled Unclassified Information (CUI), or Proprietary Information (PI) should be a top priority, no matter where you’re participating. Clarify with your participant what they can share about their projects with others and in what context. With so many staff teleworking as well as our participants, we all face new challenges to participating productively and securely.

Shared spaces can be a challenge; if you or your participant are at home with family members or roommates who are also working/schooling from home, make sure to protect sensitive OUO, CUI, or PI information. Use screen blockers to prevent someone from reading over your shoulder; lock your screen when you need to step away from your keyboard; and do not leave documents on your desk.

Social media is a nice tool to feel connected, but we should still be mindful of what we are sharing. When sharing pictures of their workspace, make sure that there are not any documents open on in their computer or on their desk that can be read by someone looking at the picture. Emphasize the importance of blurring background if in a shared space. Once it is uploaded onto a social media platform it becomes much more difficult to control who sees it and what information they can glean from it.

Even on facility-specific platforms that require a facility email address, good OPSEC dictates that we limit sharing work-related information to those with a need to know. Just because the organization staff participate and post on a facility-specific platform does not mean that the platform shares all the same protections of the facility network. Even if something is appropriate to share when participating behind the facility firewall, think about whether you or your participant should post it beyond the facility’s IT protections.

When working from home, it can be easy to fall into a “relaxed” mindset. That makes being mindful of good OPSEC practices even more important to protect our business sensitive information. While our work set-ups can be casual, our attention to OPSEC needs to remain business as usual!
# Facility Websites and Links

## Resources:

<table>
<thead>
<tr>
<th>Function</th>
<th>Contact Name</th>
<th>Contact Email</th>
<th>Website</th>
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</thead>
<tbody>
<tr>
<td>IT Support</td>
<td></td>
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<tr>
<td>Training</td>
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## Other Helpful Links:

<table>
<thead>
<tr>
<th>Site</th>
<th>Description</th>
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</table>
Mentor – Participant Agreement

This form provides a framework for a conversation around remote experience expectations between you as the mentor and your participant. By collaboratively developing shared expectations, both you and the participant can increase your sense of ownership of and commitment to the appointment expectations, resulting in a better experience and mentoring relationship.

If desired, you and your participant can first independently consider personal expectations for the experience by using the “Mentor Expectations,” “Mentor-Mentee Expectations,” or “Undergraduate Research Trainee Expectations” provided in Appendix B in the Remote Mentoring Guide.

Please note – this form and any associated documents are only intended as guides! You are encouraged to add any additional expectations and remove any that do not apply in your specific context.

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Participant: ___________________________ Mentor: ___________________________

This agreement outlines the parameters of our partnership on the assigned project(s).

1. Our major goals are:
   a. proposed project goals –
   b. participant’s personal and/or professional goals –
   c. mentor’s personal and/or professional goals –

2. Our shared vision of success in this project is:

3. The participant will participate at least XX hours per week on the project, with core hours between XX a.m. (time zone) and XX p.m. (time zone).

4. On a daily basis, our primary means of communication will be through (text, phone calls, Slack, etc.).

5. We will meet one-on-one via (phone, Zoom, Microsoft Teams, etc.) to discuss our progress, the project goals, and to evaluate the participant’s progress at least once (or other number of times) per week.
   a. It will be the (participant’s/mentor’s) responsibility to schedule these meetings.
   b. In preparation for these meetings, the participant will –
   c. In preparation for these meetings, the mentor will –
6. When learning new techniques and procedures, the mentor will train the participant using the following procedure(s): (e.g. write out directions, verbal instructions, videos, remote demonstration via screen share or other method, etc.)

7. The proper procedure for documenting research results in our team is: (be sure to include platform, format, frequency, and content)

8. If the participant gets stuck while participating on the project (e.g. has questions or needs help with a technique or data analysis) the procedure to follow will be:

9. The standard operating procedures for our team, which all team members must follow, and the participant agrees to follow, include: (e.g. required institutional training, attend weekly online meetings, etc.)

10. The mentor and participant have discussed the methodology used in the facility in detail and the participant understands what is expected of them. To become part of the team the participant must complete the following safety procedures and/or ethics training(s):

11. The mentor agrees to read and revise the participant’s writing according to the following procedure:

12. Other issues not addressed above that are important to this experience:

By signing below, we agree to these goals, expectations, and parameters for this project.

Participant’s Signature: ___________________________ Date: ___________________________

Mentor’s Signature: ___________________________ Date: ___________________________
Guidance on Remote Communication for Mentors

All appointments, but especially remote appointments, benefit from a strong communication plan. Below are some key features to consider.

Regular contact
- Daily instant messages
- Weekly summary reports
- Weekly phone/video call
- Biweekly group/team meetings

Consistent methods
- Facility-approved instant messenger – Lync, Slack, etc.
- Facility-based secure e-mail
- Phone calls
- Text messages
- Facility-approved video conferencing – Lync, Microsoft Teams, GoToMeeting, Zoom, etc.
- Office hours – mentor available at specific time each week for drop-in questions

Clear scheduling & availability
- Weekly meeting at same time each week
- Shared calendar for one-off or impromptu meetings
- Shared calendar or task list for tracking daily tasks and deliverables
- Consider time zones: 9 a.m. ET = 6 a.m. PT; 4 p.m. PT = 7 p.m. ET
  - May affect expected hours of participation
  - May affect availability for meetings

Clear expectations
- Discuss expectations with your participant in a meeting early on
- Give your participant a chance to describe their expectations for the appointment

Consider the “what-ifs”
- What if the mentor is unavailable for a week? Who will support the participant in their project? Providing contact information and schedule/availability for a secondary contact up front can prevent issues later on.
- What if the participant has class or another responsibility during a regular meeting time? Are they responsible for following up each week/month? Could the meeting be rescheduled?

If there’s a problem or potential problem, contact your ORISE contact as soon as possible.
- Not meeting expectations or not responsive to feedback and guidance
- Unresponsive to email or phone calls
- Any concerns about health or safety
Teleworking Etiquette

As part of participating remotely, you as the mentor will need to set up video meetings using varying platforms such as Skype/Microsoft Teams/Zoom, etc. Since staff across all ORISE hosting facilities are experiencing an unprecedented shift to teleworking, these tips have been compiled to help make your remote experience as productive as possible.

**Set up and test your technology.** Take time in advance of the meeting to make sure your platform works and settings are correct. Use a headset to improve your audio quality. Be sure to turn on your webcam access. Encourage others to do the same so you can have face-to-face interaction. For larger and more complicated meetings, enlist a colleague and do a dry run to test your slides and equipment.

**PRO TIP:** Contact your IT department or Help Desk for help in getting the right technology and peripherals to participate remotely. They may have stock computers, webcams, headsets that can be made available to participants.

**Start the meeting with an orientation and expectations.** If you are using an online platform that people aren’t familiar with, take a few minutes at the start of the meeting to orient them to the features and how they will be used. Ask people to test their microphones and webcams and type in the chat window.

**PRO TIP:** A simple “can you hear me now” is a great way to test your audio and allows others to test theirs also.

**If it is a large meeting, identify a moderator who can watch the chat window and makes sure online participants have an opportunity to contribute.** Sharing thoughts can be tough online if there isn’t some “dead air” time. For large numbers of participants, you might set the expectation that everyone types a question in the chat window or virtually raises their hand before unmute their microphone to share in the large group.

Because your participant might be uncomfortable with asking a question, reach out to your participant to ask their thoughts so they can actively participate in the meeting. Do NOT assign your participant to take notes or be the moderator; they need to participate as a team member.

**PRO TIP:** Work with your moderator prior to the meeting and let them know when you will be asking for virtual input—if you forget, they can help by doing it for you.

**Focus on the meeting.** It’s easy to get distracted when you’re in an online meeting.

**PRO TIP:** Consider closing other applications like Outlook to help you actively participate.

**Create deliberate moments for everyone to participate.** A lot of virtual meetings end up becoming a one-way flow of information during which participants check out or do other things. To keep people engaged, ask questions and solicit their thoughts. During discussion of a new initiative, you might ask everyone to type their top concern in the chat window. Responses like these can be easily captured and sent out to the group after the meeting.

**PRO TIP:** Have a moderator help you with this!

**Be aware of background noises that can distract participants** (e.g. opening a bag of chips can make it hard for anyone to hear what is going on). Don’t have side-bar conversations.
Hearing an echo? Echoes can be an annoying issue on virtual meeting platforms like Skype/Teams/Zoom and others. They are caused when an attendee has two open microphones – most commonly caused by clicking the meeting link on your computer (activating your computer’s microphone), and then simultaneously dialing into the meeting from a phone (opening a second microphone).

**PRO-TIP:** If you are in a meeting with an echo, the attendee who can’t hear the echo is the echo’s source.

Need more suggestions? Below are more personal insights and suggestions from an experienced, remote worker.

**Jump on early**

- The earlier you connect to a meeting, the sooner you can get any technical difficulties out of the way. This goes for presenters and attendees too.
- Do a check when you connect – make sure others can hear you and you can hear them. It can be as simple as saying “Hello”. If it is not working, try reconnecting (sometimes it takes a few tries) or varying your setup.
- Engage in small talk, too - as people join, they can quickly confirm that they’re hearing audio. This is also a good time to make up for lost hallway conversations.

**Start your video**

- It is best to turn your camera on when meeting remotely, however, video costs bandwidth -- if your connection doesn’t have enough, inform your participant or others before you disconnect your camera. Slow, jumpy video can be distracting, or can impact audio (which is worse).
- If video bandwidth is impacting the audio, consider running the audio through your phone (separate network) and video through your computer.
- If you do start your camera, make sure you are looking at the camera (usually at the top) -- it helps to position your video/participant window to the part of the screen nearest the camera.
- If you can’t use a camera, having a profile picture helps (especially for new people or to see the speaker).

**To mute or not to mute?**

- Develop a good habit of staying on top of the mute button. Muting often is better to reduce background noise and bandwidth.
- Background noises (e.g., dogs barking, kids talking, lawnmower, sirens) can be a distraction when working from home, so be conscious of when you need to mute.
- Be aware that some microphones can pick up noises in different or strange ways – your typing or mouse movements may be louder to everyone else than you, and background noises might be louder than you think.

**Be accommodating**

- Introduce yourself when you make a statement if not everyone knows your voice. Again, having a profile picture makes it easier for people to see on the screen who is talking.
- Some people can’t see the chat (e.g., they’re only connected by phone), so try to address comments verbally or read them aloud if you know someone in the meeting can’t see them.
• Some people can’t hear audio (often people connect without audio if they are still listening in on another call), so you may need to use the chat feature.
• Some people can’t see the screen or have a bad connection, so explain what you’re showing/pointing at, and go slowly. Verify that people are following along.
• Send out agenda, presentation, or materials for those who can’t fully participate via Skype/Teams/Zoom.
• Send out notes or record the session (if others are comfortable/aware) for those who can’t be there or are missing audio/video. Task a participant with taking notes if you are the lead or driver.

Feedback
• Some people don’t realize how they come across on a call, so privately message them (during or after the call) to let them know of technical issues (e.g., noisy microphone, background noise, loud keyboard typing). Helping someone fix their setup benefits everyone and reduces distractions in future calls.
• If you can’t hear someone very well, say something. Don’t be afraid of being rude – others might be experiencing that problem, too, and it’s much better to have a quick interruption to fix the problem. The speaker might be able to position the microphone closer or make other adjustments. What people have to say is valuable, and it wastes time and opportunity if they aren’t heard.
• If you can’t see something very well, say something. The presenter may need to slow down to let screen sharing catch up or need to adjust the video position/lighting.
• If you need to step away from the keyboard but don’t want to interrupt the speaker, try noting it in the chat window (e.g., brb), then note when you’re back.
• Ask for feedback so we can build our productivity as a whole.

General tips for working remotely
• Practice good OPSEC.
• Consider the safety of your environment (ergonomics) and wisely choose equipment (noisecanceling headphones, healthy lighting, a good chair/desk setup, even a sit-stand workstation or laptop keyboard/stand accessory may be worth it – some of these may be personal investments).
• Clearly communicate when you will be available (or unavailable) and plan up front. Line management, project management, and team members with whom you work closely should be aware. Update your Skype/Teams/Zoom status, block your calendar, and/or send emails.
• Have a backup plan – what will you do if equipment fails, a network connection drops, or distractions are unavoidable? Can you still get email on a personal device? Can you phone in if Skype/Teams/Zoom isn’t working? Do you have backups of files you need? There are ways you can have your files available when offline, which may help.
• Since everyone is working remotely for extended periods of time, check in with your line/project manager (be proactive) and do periodic self-checks. Make sure that you are also helping your participant to deal with working remotely. Ask them, how well are you managing your time/distractions? Do you need any additional resources from me? How is your morale? What could you do better/differently to help work/life balance?
• Make sure that your group Admin or business support is connected with your participants and available to provide assistance.

• Set good boundaries and be intentional. Most of us work best when we have a dedicated space for work, can close off distractions, and can punch in and out of a virtual clock.

• Dress professionally from the waist up. This helps us get in the professional mindset. Flexibility of working from home can be great, and for some essential, but it’s up to each of us to be good examples and make it work for us, our colleagues, and the lab.
Remote Research Experience Standards

Generally accepted standards for a high-quality research experience with modifications for remote mentoring.

<table>
<thead>
<tr>
<th>STANDARD</th>
<th>REMOTE MENTORING INCLUSION METHODS</th>
</tr>
</thead>
<tbody>
<tr>
<td>Has a well-defined research task which is integral to, or a spin-off of, the mentor’s ongoing research</td>
<td>Provide background readings from your research and help participant develop a participation plan for the assigned research task(s).</td>
</tr>
<tr>
<td>Has been designed for success with respect to participant skills and capabilities</td>
<td>Use this guide and other tools/training to help you and your participant(s) be successful with remote research experience; Structure research task(s) for a remote experience.</td>
</tr>
<tr>
<td>Includes elements of the research process, such as: designing experiments; creating mathematical models; collecting, analyzing and synthesizing data; keeping a research journal; communicating results</td>
<td>Include most of the elements of the research process in the participant’s experience and discuss the other elements with your participant; take advantage of opportunities to use technology for some elements (e.g. use of an electronic research journal)</td>
</tr>
<tr>
<td>Incorporates the research process, with uncertainties, false starts, and loose ends</td>
<td>Acknowledge and discuss uncertainties, false starts and loose ends that are part of the research process as they occur.</td>
</tr>
<tr>
<td>Involves technologies new to the participant</td>
<td>Take advantage of opportunities to include technologies that may be new to both you and your participant.</td>
</tr>
<tr>
<td>Involves an understanding of the broader context and scientific literature of the research project</td>
<td>Include participant in team and one-to-one discussions about the broader context and scientific literature of the research project.</td>
</tr>
<tr>
<td>Involves presentation of results for peer review (scientists and other participants)</td>
<td>Have your participant present results via remote technologies for review by project team and other participants.</td>
</tr>
<tr>
<td>Makes the participant part of the research team, modeling the interdependence of team members</td>
<td>Include your participant in meetings with other members of the research team to inform the participant’s project or knowledge base. Engage various members of the research team in regular remote interactions with the participant to help inform, advise and build community.</td>
</tr>
<tr>
<td>Provides opportunities for developing and updating their own research knowledge and laboratory skills</td>
<td>Use remote technologies to develop and update your own research knowledge and technical skills via virtual interactions and simulations.</td>
</tr>
<tr>
<td>Participants experience being at a research facility so they start thinking of themselves as scientists and part of a research team</td>
<td>Encourage your participant to participate in the facility provided enhancement activities that explore the variety of research across the scientific facilities and other research facilities, and help your participant understand how collaboration enables research in your field.</td>
</tr>
</tbody>
</table>

Other considerations:

- Equity of access to underrepresented minorities (URMs) and women: Share/provide resources and equipment to enable participation of all populations with a particular focus on enabling participation of URMs and women.
- Frequent monitoring of program progress: Work with the appropriate staff within your organization and ORISE to regularly monitor and respond to your needs and the needs of your participant.
- Supportive learning environments: Use regular, frequent remote communication to support your participant during the learning process.
- State-of-art facilities, equipment & instruments: As appropriate, seek and employ opportunities for your participant to remotely access state-of-the-art equipment and instruments.
- Robust evaluation program focused on continuous improvement: Assess, evaluate and appropriately respond to your participant’s progress during the appointment period.
Meeting Check-in Guide

The following is a guide to help direct your meetings or check-ins with your participant. Feel free to modify as needed.

Participant: ___________________________  Mentor: ___________________________

Date: ___________________________

**Check-in:**
Personal or professional updates, successes to celebrate, or challenges you have encountered.

---

**Specific goals or topics for this meeting:**

Time sensitive issues and upcoming deadlines

Ongoing or new projects (goal, measure of success, steps, resources & skills needed, timeline)

Career guidance (CV, networking, etc.)

---

**Follow-up actions and expectations:** (include time frame)
Participant:

Mentor:
Warning Signs

Mentoring a participant can be a very rewarding experience. However, being a good mentor is not just a matter of winding up the participant and watching them go. Quality mentoring requires a substantial time commitment and the willingness and ability to take a leadership role.

Below are warning signs adapted from The Google Summer of Code Mentor Guide which provides great ideas for mentoring a participant remotely (https://google.github.io/gsocguides/mentor/).

Mentors are best able to identify the warning signs and “red flags”. Responding to these signs is key to addressing potential problems before they go too far.

**Not enough hours in the day:** If your participant has problems setting and following a specified time schedule, this may be a red flag that they need help with time management, they have over committed themselves (another job, classes, family commitments), or that they have other issues that need attention.

**Missing participant:** Missing a predefined meeting is a warning sign that your participant might not be taking the appointment seriously and this should be remedied as early as possible. If your participant was in such a deep train of thought on the project that they forgot the meeting, but afterwards you held an alternate meeting and they did complete the tasks that might be acceptable. A single meeting that was overlooked is likely not an issue, particularly if they notice and contact you about it, but be alert if it happens repeatedly or if the participant seems unaware of the missed meeting.

**What is it a valid excuse?** Participants have been known to come up with outlandish excuses as to why they are not meeting their milestones. *(You did agree on milestones beforehand, right?)* If you think that your participant is not being honest with you that is a warning that things might be going sour. Make sure to remind them that real life sometimes gets in the way and assure them that they can redouble their efforts next week to get back on track. This is always better than “my village was invaded by aliens.”

**When you do all the right things and it still goes wrong:** One thing to keep in mind: *Sometimes you do everything right and the participant just doesn’t work out.* Don’t take it personally. If a mentor tries their hardest and their participant fails, this does not reflect badly on the mentor. 

“**Actions Speak Louder Than Words**” - Below are some specific scenarios to watch.

**The disappearing participant:** A participant is enthusiastic about discussing the project and getting started. You rank them high, they get accepted, and then they drop off the face of the earth. How do you reconnect with your participant? This is the time to coordinate with your ORISE contact to discuss the next steps.

**Not meeting expectations:** Your participant enthusiastically participates in the professional development and community outreach activities but when it comes time to completing a task, they seriously not meeting expectations. They offer excuses when pressed and offer parts of a task here and there. They continue not to meet the agreed upon requirements. Is there a communication problem about what is required/expected? Does your participant not have the skills necessary to complete the
project? Do you need to redesign the project? The sooner you can reconnect with your participant the better.

**Wrong priorities:** Your participant is completing their assigned tasks but has been offered the opportunity by their university to present their research at a 3-day conference. You agree to this because you think it will be a great experience for your participant to develop their presentation skills. After they return, the quality of their participation is seriously affected. You discuss this with them immediately and they promise to reprioritize, but the level of effort is not as expected. You need to review your project agreement and try to get them back on track.
Delivering Feedback

Whether mentoring in-person or remotely, effective feedback should be delivered to your participant throughout the project. Feedback should be provided about their communication, progress, and documentation.

**Deliver timely feedback:** Don’t wait until several issues have come up, or until your participant has impressed you multiple times with their efficiency. Let them know right away what you think.

**Make a point to give positive feedback:** When your participant completes a task on time, and especially when they exceed your expectations, let them know! Early praise is a far better motivator than late criticism.

**Do not avoid critique – but be sure commentary is useful and constructive:** Try to put yourself in your participant’s shoes and consider how you might want to receive constructive criticism. Make sure to phrase suggestions positively. If your criticism is somewhat personal in nature (i.e. tone of an email, timeliness or other non-work issues), deliver it in private rather than in a public forum. When videoconferencing, ensure others are not around. When in doubt about how to deliver constructive criticism, ask for advice from more experienced mentors or from your organization’s administrator.

**Consider the situation when deadlines are missed, or the project is not progressing as planned:** Don’t be overly critical of date slippage. It happens. Fanatical adherence to dates does not lead to successful project completion, nor does it make your participant feel excited to contribute to your project long-term. Be sure to discuss any critical milestones during initial correspondence and review them periodically to ensure your participant stays on track. Remind participants how their project fits within the big picture.
Appointment End Checklist

Use this resource to help your participant end successfully from a remote appointment.

<table>
<thead>
<tr>
<th>Participant Name</th>
<th>Start Date</th>
<th>Primary Work Location</th>
<th>Group Leader</th>
<th>Peer Mentor</th>
<th>Team Leader</th>
</tr>
</thead>
</table>

**Before End Date: Steps to be completed prior to exit:**

- ☐ Mentor meets with participant and provide feedback.
- ☐ Mentor completes end of appointment mentor survey, as required by the program.
- ☐ Helps participant meet program requirements as detailed in ORISE letter of appointment.
- ☐ Ensure all facility-owned equipment has been returned.
- ☐ Determine if participant will be (1) continuing/returning (keep on the books) or (2) terminating, as allowed by the program.
- ☐ Mentor provides recommendations as requested by participant.
Frequently Asked Questions (FAQ)

What if my participant is not able to participate 40 hours/week or the project does not have enough substance to fill 40 hours/week?
   Discuss with your ORISE contact. Part-time appointments may be possible depending on specific program requirements.

What should I do if my participant realizes they cannot complete their remote appointment?
   Contact your ORISE contact as soon as you realize your participant has concerns about finishing their remote appointment.

What if my participant wants to end the appointment early?
   Contact ORISE.
Appendix B – Optional Mentoring Resources
SMART is an acronym for a framework to help guide goal setting. It is intended to ensure that goals are planned, clear, trackable, and reachable. With SMART goals, you are more likely to achieve the goal efficiently and effectively. Below is an overview of the framework to establish SMART goals.

**S = Specific**
Be specific in what you want to accomplish. A specific goal has a much greater chance of being accomplished than a general goal. To set a specific goal you must answer the six “W” questions:
- **Who:** Who is involved?
- **What:** What do I want to accomplish?
- **Where:** Where is located (if applicable)?
- **When:** When will you complete this?
- **Which:** Which requirements or constraints are involved?
- **Why:** Why is this important (i.e. specific reasons, purpose or benefits of accomplishing goal)?

**M = Measurable**
Establish metrics or criteria to determine whether you met your goal. This makes your goal more tangible and provides a means of measuring progress. When progress is measured, you are more likely to stay on track, reach your target dates, and experience the exhilaration of achievement.

To determine if a goal is measurable, ask questions such as……**How much? How many? How will I know when it is accomplished?**

**A = Attainable**
Make your goal attainable. Your goal needs to be attainable and realistic to be achievable. When a goal is important to you, you begin to figure out ways to reach it. You develop the attitudes, abilities, or skills and determine the financial capacity or resources to achieve it.

To determine if a goal is attainable, ask questions such as……**Is the goal doable? Do I have the necessary resources? Do I have the necessary skills?**

**R = Realistic**
Set a realistic goal. A realistic goal must represent an objective toward which you are both willing and able to work. A goal can be both high and realistic; you are the only one who can decide just how high your goal should be. But be sure that every goal represents substantial progress.

**T = Timely**
Set a realistic target date to complete your goal. With no time frame tied to your goal, there’s no sense of urgency. If you want to complete an analysis of a dataset, when do you want to finish the analysis? Stating “someday” will not work. But if you anchor it within a time frame, “by July 1st”, then you’ve set your unconscious mind into motion to begin working on your goal.
Undergraduate Research Expectations

1. Why do you want to do research?

2. What are your career goals? How can this research experience and the mentor–participant relationship help you achieve them?

3. What would success in this research experience look like to you?

4. How many hours per week and at what times/days do you expect to participate on your research?

5. What, if any, specific technical or communication skills do you expect to learn as part of the research experience?

6. What techniques and skills are required for this research experience and how will you learn them (through a written procedure, verbal instructions, videos, etc.)? What can your mentor do to help you learn the techniques and skills that you need to be successful in your research experience? What can you do to help yourself learn?

7. If you have previous research experience, what skills do you expect to bring to your new research group?

8. How will you document your research results? Is there a specific platform and format your mentor would like you to use? How often does your mentor expect you to report on your research, and what details would they like you to include?
9. If you have questions about your research project, whom will you ask? Should you bring questions to your research mentor first, or to others in the research group? If others, can your mentor identify those in the group who would be good resource people for your project?

10. Will the research that you will be involved in be confidential? Are you allowed to discuss your project with other individuals outside of your laboratory?

11. What role will your mentor play in the development of your skills as a writer? Is your mentor willing to help you with your research-related writing along the way or do they only want to read it after it is in its final version? If your mentor only wants to read final versions of your writing, whom should you go to for proofreading?

12. Are you aware of all the safety and ethics training that is required to for you to participate on your research project? Discuss the required training with your mentor and establish a deadline by which you should complete it.

Mentor Expectations for the Remote Research Experience

1. How can having a participant participate remotely on this research project contribute to your career goals? How can the mentor - participant relationship contribute to your career goals?

2. At the end of the appointment term, what does success for this remote research project look like to you?

3. What does the schedule look like for your participant?

4. What, if any, specific technical or communication skills do you expect your participant to learn as part of their research experience? How do you plan to teach these skills to your participant (through a written procedure, verbal instructions, videos, remote demonstration through screen share or other method, written or verbal feedback, etc.)?

5. What is your mentoring approach? Once your participant has learned the techniques and procedures used in your lab do you prefer to monitor your participant closely, walking them through all the steps or do you prefer to let your participant participate independently?

6. How will your participant document research progress and results? Is there a specific platform and format you would like your participant to use? How often would you like your participant to document their research progress, and what details would you like them to include?

7. To whom should your participant go if they have questions about your research project? Do you expect them to come to you solely (or first), or should they feel free to ask others in the research group? If others, who would be good resource people for your project?

8. Is your participant’s research confidential? Are they allowed to discuss your project with other individuals outside of your laboratory? What are your expectations?
9. What role will you play in the development of your participant’s skills as a writer? Are you willing to help them with research-related writing along the way or do you only want to read it after it is in its final version? Is there someone else in the lab/research team who is available to help your trainee with their writing?

10. Discuss the institutional training that is required for your participant and establish a deadline by which they should complete it.

11. If a participant has previous research experience, is there anything that you need to share about this research group that is unique and that the participant should be aware of?

Mentor-Mentee Expectations

It is a good practice to establish expectations between you and your participant to further foster your mentoring relationship, especially during a remote mentoring experience. Below is a guide that you can reference.

I expect my **mentor** to:

1. meet with me at least 2-3 times each week, using video when possible.
2. be open to my questions and to take time to think about them carefully.
3. be patient with me because I am new to research.
4. initially be directive but eventually let me design and do experiments on my own.
5. challenge and encourage me.
6. teach me basic research techniques/procedures and safety protocols.
7. help me define a project that is doable, yet relevant, and that keeps me busy.
8. help me understand the basic scientific concepts and study design underlying my project.
9. understand when I need to take time away from research to focus on my professional development and allow me to take it.
10. help me network with other researchers in the group and/or discipline.
11. be willing to discuss possible career goals and/or future jobs that will utilize the skills being learned during this research opportunity.

I expect my **participant** to:

1. be present (video) and punctual when we have scheduled meeting times.
2. give their best effort.
3. manage their time efficiently and effectively when doing research.
4. keep up with the assigned tasks, but to let me know if they need a break from research.
5. make every effort on their own to understand the research our group does, but to ask questions when they do not understand.
6. listen carefully, take notes, and follow instructions when being taught new techniques.
7. follow all safety procedures and behave ethically.
8. gradually gain independence, but to regularly communicate with me about what they are doing.
9. be able to analyze their experimental data, generate logical conclusions based on that analysis, and propose future experiments, with assistance.
10. participate cooperatively, collaboratively, and respectfully with other members of the research team.
11. be attentive and creative and contribute at research group meetings.
FAST Constructive Feedback

The basics of providing constructive feedback remotely are the same as the basics of providing constructive feedback in person. Providing quick, specific, and constructive feedback is essential. A recommended format is “FAST” – Frequent, Accurate, Specific, and Timely feedback. The following details the key elements of the FAST feedback process.

<table>
<thead>
<tr>
<th>Frequent</th>
<th>Some participants need feedback more often than others – each one has a unique “feedback frequency.” Giving participants feedback at their individual rates of need is the first key behavior of the best coaching-style mentors. Identifying and tuning in to each participant’s frequency is the corresponding skill of this behavior.</th>
</tr>
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<tbody>
<tr>
<td>Accurate</td>
<td>Every instance of feedback has an effect on the participant’s trust and performance. Giving feedback that is correct, balanced, and appropriate is the second key behavior of effective coaching style mentors. Its corresponding skills include taking the time to reflect and question assumptions, check facts, and rehearse the feedback’s delivery.</td>
</tr>
<tr>
<td>Specific</td>
<td>Telling people exactly what they do right and wrong is not specific enough – you must also tell people exactly what next steps are necessary to achieve the best results. This is the third key behavior in giving feedback, with setting concrete goals and deadlines, and providing clear guidelines, as the corresponding skills.</td>
</tr>
<tr>
<td>Timely</td>
<td>The closer in time feedback follows the performance issue, the more impact the feedback will have on the participant, and the better the chances that any needed improvements will be made. Giving feedback immediately is thus the fourth key behavior of good coaching-style mentors. Effective time management is its corresponding skill.</td>
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Research Group Focus

This activity is intended to help new research participants learn about their research group’s goals and how their project fits into these goals.

Write one paragraph, in your own words, describing the focus of your group’s research. Be sure to include the group’s major research questions or hypotheses, the types of techniques they use to investigate these questions, and what area(s) of this research are most interesting to you.

Read your paragraph out loud to your research team during your next lab meeting to get feedback on your understanding of your research group’s focus.
This activity is intended to help new research participants learn about their research group and how their project fits into the “big picture” of the group’s research goals.

1. Ask your mentor to give you an overview of the people in your research group and their roles and responsibilities. Use the table below to document what you learn. Refer to the table on the next page if you are unfamiliar with the typical titles in a group.

2. If possible, meet each member of your research group to learn more about them and their research. Update the table below with any additional information you learn.

3. Draw a diagram to identify the people and projects in your research group. The diagram should represent how the projects are connected to one another, how the people are connected to one another, and how the projects and people are connected. The research group’s overall area of study should be represented, and ideally encompass all parts of the diagram. Specifically include how you and your project fit in, and with whom in the group you see yourself collaborating.

### Personnel in Your Research Group

<table>
<thead>
<tr>
<th>Title (e.g. professor, grad student)</th>
<th>Responsibilities and Specific Projects</th>
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<tbody>
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### Diagram of Your Research Group:
### Research Group Personnel

<table>
<thead>
<tr>
<th>Titles</th>
<th>Degree</th>
<th>Roles &amp; Responsibilities</th>
</tr>
</thead>
<tbody>
<tr>
<td>Professor</td>
<td>MS or PhD</td>
<td>Faculty member at an academic institution who is the leader of the research group. Typically, is the principal investigator (PI) on grants funding the group’s research. Senior mentor to all personnel in the research group. In addition to research, professors also have teaching and service responsibilities.</td>
</tr>
<tr>
<td>Principal Investigator (PI)</td>
<td>MS or PhD</td>
<td>The lead person on a grant funded project. Responsible for oversight of all aspects of the project. Often is a professor but may be a senior researcher or scientist who does not have teaching or service responsibilities.</td>
</tr>
<tr>
<td>Scientist</td>
<td>PhD</td>
<td>A staff person whose primary responsibility is to do research. Although scientists are usually part of a research group, core research facility, or research institute they are highly independent and often provide leadership within the research group.</td>
</tr>
<tr>
<td>Researcher</td>
<td>MS or PhD</td>
<td>A staff person who collaborates with the PI and scientists on the research team to carry out research projects.</td>
</tr>
<tr>
<td>Instructor</td>
<td>MS or PhD</td>
<td>A staff person dedicated to teaching lecture and lab/field courses. Instructors may also serve as academic advisors.</td>
</tr>
<tr>
<td>Post-doc</td>
<td>PhD</td>
<td>Post-doctoral fellows have earned their PhD and are gaining additional training to prepare for the next step in their career. Post-docs are mentored by the PI but work independently on the research team and may provide mentorship for more novice team members. Post-docs are usually focused on research, but some positions include teaching.</td>
</tr>
<tr>
<td>Technician</td>
<td>BS or MS</td>
<td>Technicians can perform a wide variety of tasks depending on their skill set and the needs of the research team. Technicians often are experts on particular techniques and, in addition to helping with research projects, they may supervise students, order supplies, and perform administrative tasks.</td>
</tr>
<tr>
<td>Graduate Student</td>
<td>BA, BS, MS</td>
<td>Graduate students have completed a bachelor’s degree and are working toward a M.S. and/or Ph.D. degree. This includes taking courses and doing research. Graduate students are mentored by the PI as they learn research techniques, experimental design, data analysis, and publication skills with the goal of becoming an independent researcher. Graduate students will develop their own research question/hypothesis to investigate and must defend their research findings to earn their advanced degree.</td>
</tr>
<tr>
<td>Undergraduate Researcher</td>
<td>None</td>
<td>Undergraduate student participating with a mentor on a research project either for academic credit or a stipend. Depending on the undergraduate researcher’s level of experience, they may help their mentor with a project or participate independently on a project of their own.</td>
</tr>
<tr>
<td>Lab Assistant</td>
<td>None</td>
<td>Undergraduate student working on the research team, usually paid by the hour, to support the team through maintenance tasks such as washing glassware/dishes, autoclaving, sorting samples, making common lab solutions, etc.</td>
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Reading Scientific Articles

Scientific Article Worksheet

This activity is intended to guide new-to-research participants through reading scientific articles.

Article Title:

Authors:

Journal Title:

Year:

The Basics:

1. What hypothesis or research question does the paper address?

2. What experiments were done to test the hypothesis or investigate the research question?

3. What are the major conclusions?

4. What evidence supports each of the conclusions?

The Critique:

1. Do the conclusions seem logical given the data presented? Why or why not?

2. Why are the conclusions important?

3. What were the best aspects of the research presented, and how could it be improved?
Additional Resources:

1. What other information or resources would help you better understand the paper?

Further Questions:

Write at least three comments or questions about the article to discuss with your mentor.

1. 
2. 
3.
Creating a Research Outline & Abstract

This activity is intended to help new research participants to conceptualize and plan their research project and develop a draft abstract to describe their research project.

Research Group’s Focus:

Research Project Title:

Introduction/Background: Identify and summarize the key background information needed to understand your research project. Write these pieces of information as a bulleted list of statements. Your hypothesis or research question should follow from this information.

Hypothesis or Research Question:

Relevance and Implications of Your Research Project: Why is your research important? What may be the potential implications of your results? Will your project benefit basic research, or lead to advances in the fields of energy, environment, or national security?

Experimental Design and Potential Results: Outline the experiments you will do to test your hypothesis. For each experiment, explain:
1. the technique(s) that will be used and the reason(s) for selecting that technique.
2. the type of data that will be collected and why this type of data will inform the hypothesis.
3. all the potential results and whether each would support, or not support, your hypothesis. Draw what the predicted results will look like, if applicable (e.g., gel, microscope image, data table, or graph).

Timeline: Outline a weekly timeline for your project. Be sure to refer to each of the proposed experiments (or parts of the experiments), allow time for analysis of data, and allow time for the preparation of a presentation of the data (e.g., poster or oral presentation).

Abstract: Synthesize the core information in your outline and write a scientific abstract of 200 words or less.
References


3. Exit Checklist. Adapted from *Intern Onboarding and Exit Checklist*, Pacific Northwest National Laboratory, 2018, Richland, WA.


7. Appointment Plan Template. Adapted from *Internship Workplan Template*, University of Washington, 2020, Seattle, WA.


10. OPSEC Telework Guide. Adapted from *OPSEC Telework*, Pacific Northwest National Laboratory, 2020, Richland, WA.

11. Peer Mentor Guide. Adapted from *Peer-Partner Guide*, Pacific Northwest National Laboratory, 2020, Richland, WA.


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