# HEA Mentor Checklist

As an HEA mentor, your role is to support your mentee through offering encouragement, guidance and advice, and providing critical peer review and formative feedback on fellowship applications.

Please review the [HEA Mentor Handbook](https://docs.google.com/document/d/19EoQSFOFTg52kzREtC4Z74P2G_1MwDhB8RC0ctJx4hc/edit?usp=sharing).

Once you receive an email from OTL connecting you with your mentee, you can do the following:

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| **Steps**  | **What to achieve**  |
| **Initial meeting** | **Before the meeting:** * Send an email to your mentee encouraging them to decide which category is best for them using the [Advance HE Fellowship Category Tool](https://www.advance-he.ac.uk/form/fellowship-decision-tool) and to download the key document folder appropriate for their category. (see email template below)
* The email contains links to key document folders for each category of fellowship. Mentees are to download the appropriate documents prior to the first meeting.
	+ [AFHEA packet](https://drive.google.com/drive/folders/1foqGWsVGwVP3izGk5Vrxddn8y7NnbaPY?usp=sharing)
	+ [FHEA packet](https://drive.google.com/drive/folders/1yblLhY_1g6XGRIosEp85cAR2XphNR_wF?usp=sharing)
	+ [SFHEA packet](https://drive.google.com/drive/folders/1lXmoMPBvr6k9Clzjra4RVw39w3PbuP7o?usp=sharing)

**During the meeting:*** Using the participant’s handbook (downloaded from the appropriate packet), discuss the specific requirements for the chosen fellowship category.
* Using the “Plan your Claim” worksheet (downloaded from the appropriate packet), discuss with your mentee what evidence they will use to support their claim. Remember, one of your most important functions is to translate the PSF into their context.
* Ask your mentee to complete the “Plan your Claim” worksheet. The core of the activity is for the mentee to start brainstorming examples from their practice that would demonstrate the various dimensions

**Post meeting*** Calendar 2 additional checkpoints for the semester, the last being draft review
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| **First Check-in** | **Pre-meeting:** mentee works on generating examples from their practice that provide evidence of engagement with the required dimensions of the UKPSF. **During the meeting:** * Engage in reflective dialogue with your mentee to discuss the examples generated using the “Plan your Claim” and to help them critically examine and describe their practice. Under “**step 4 section IV”** of the [HEA Mentor Handbook](https://docs.google.com/document/d/19EoQSFOFTg52kzREtC4Z74P2G_1MwDhB8RC0ctJx4hc/edit?usp=sharing), you will find examples of strategies that may assist you to engage in reflective dialogue as you mentor colleagues.
* Ensure that your mentee knows the logistics for submitting their applications. Inside the packet, they will find the application form,and the review grid used by assessors.

**Post meeting:**Ask your mentee to start crafting their claim using the application form.Email your mentee to remind them that they need to send you their first draft before the next scheduled meeting. (see email 2 template below)  |
| **Draft Review** | Meet with your mentee to give feedback.Use the resources available in the [HEA Mentor Handbook](https://docs.google.com/document/d/19EoQSFOFTg52kzREtC4Z74P2G_1MwDhB8RC0ctJx4hc/edit?usp=sharing) to give constructive feedback. The checklist for reviewing draft applications is especially useful. |
| **Final Check-in (optional)** | This could be done a week before the submission deadline to ensure that your mentee is ready to submit |

**Possible emails:**

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| **Email 1**Dear x,I’m glad to be your mentor and look forward to supporting you in writing your HEA Fellowship claim. Our first meeting will be on…. (use Outlook to schedule appointment)In preparation for our initial meeting, here are some tasks that you need to complete. Doing so will allow us to be immediately productive.1. Use the [Advance HE Fellowship Category Tool](https://www.advance-he.ac.uk/form/fellowship-decision-tool) to help you decide which fellowship category is most appropriate for you. The tool consists of approximately 18 questions and should take around 10 minutes to complete.
2. Once you have decided on a fellowship category, [download the appropriate resource packet](https://drive.google.com/drive/folders/1xjG-X1SH5KR8-5f2y-DKpqO8jtPOjfF4?usp=sharing). Note that the link will give you access to the resources for 3 different fellowship categories; select one based on your appropriate fellowship category.
3. Read the UKPSF document inside the packet.
4. In our first meeting, we will work with the Planning Your Claim worksheet (inside the packet).

If you have any questions, please let me know. Looking forward to seeing you.Best regards, |
| **Email 2**Dear x,We are scheduled to meet (day/time). It would be great if you would send me your first draft for review before the meeting. Email if you have any questions.Best, |