Mentoring Challenges

And how a career development plan can help
Outline of Presentation

- Mentoring Vignette – Case Discussion
- Mentor/Mentee Competencies
- The Individual Development Plan
- Q and A
MENTORING VIGNETTE

- As the mentor/mentee -- what went wrong in this mentoring relationship? Could it have been avoided? How?

- How would you propose to move forward from here if you were the mentee? The mentor?

- What system changes would you put into place to lessen the possibility of this kind of mentoring failure in the future?
Mentor Role

You are an assistant professor, clinician investigator in clinical translational research. About 6 months ago one of the KL2 junior faculty scholars (Jim) asked that you mentor him on a new research project. You were apprehensive about taking on mentoring responsibilities but you agreed because he seemed enthusiastic and the project was in your area of interest. Since then, you have met with Jim twice but have not seen any concrete products and have not had any communication for the past 3 months (other than a hallway conversation in which he told you that he was making progress). You feel frustrated and also a bit guilty that perhaps you should have done more to move the project along. You received an e-mail a few days ago from Jim to set up a meeting but have been too busy to respond – and are not sure whether to meet or tell him you are now too busy to help.
Mentee Role

You are a 2nd year KL2 scholar junior faculty member interested in clinical research and at the beginning of this year (6 months ago) you approached a junior faculty member (Dr. Good) and asked her to mentor you on a clinical research project in her area of expertise. She agreed and you have met twice to discuss your ideas but you have been uncertain where to go with it. In addition, a few months ago, the Dept. Chair asked you to provide some advice on the roll out of a new electronic health record for the department as you have some background in health IT and she thought it would be good experience for you. You have enjoyed this but it has taken a lot of your time. In addition, your first baby was born 6 months ago and you have had challenges juggling childcare duties. You sent an e-mail to Dr. Good 3 days ago asking her to set up a meeting but have not had a reply yet. You have not decided what you want do about the project and are having some second thoughts about a research career - but are not sure if or how you can bring this up.
MENTORING VIGNETTE

- As the mentor/mentee -- what went wrong in this mentoring relationship? Could it have been avoided? How?

- How would you propose to move forward from here if you were the mentee? The mentor?

- What system changes would you put into place to lessen the possibility of this kind of mentoring failure in the future?
Differential Diagnosis of a Problem Mentoring Relationship

• **Mentee Centered**
  - Unclear career direction; ambivalent about research career
  - Passive approach towards mentoring
  - Work – Life Balance
  - No IDP
  - Personal Issues?

• **Mentor Centered**
  - Not ready to be the ‘lead’ research mentor
  - Failed to set clear expectations

• **Program Centered**
  - Lack of formal mentoring program -- oversight, tools (IDP), feedback, mentoring teams, regular check-ins, mentor/mentee training etc

• **Mentor Centered**
  - Lack of mentor training
Qualities of Effective Mentors and Mentees
Qualities of Outstanding Mentors

CLINICAL RESEARCH STUDY

Defining the Ideal Qualities of Mentorship: A Qualitative Analysis of the Characteristics of Outstanding Mentors

Christine S. Cho, MD, MPH,a,b Radhika A. Ramanan, MD, MPH,c Mitchell D. Feldman, MD, MPhilc

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ABSTRACT

OBJECTIVE: The study’s objective was to identify the important qualities of outstanding mentors as described by their mentees’ letters of nomination for a prestigious lifetime achievement award in mentorship.

METHODS: The Lifetime Achievement in Mentorship Award at the University of California, San Francisco, recognizes a faculty member who has demonstrated sustained mentoring excellence in the academic health
5 Characteristics of Outstanding Mentors

1) Time commitment to mentoring
2) Personal qualities: enthusiasm, altruism,
3) Act as a career guide for mentee
4) Support personal/professional balance
5) Leave a legacy of how to be a good mentor

Cho C, Ramanan R, Feldman MD. AJM 2010
The Art of Mentoring

“He knows what each plant in his garden needs to thrive: this one a little more sun, this one more fertilizer; this is a good metaphor for his mentoring [as] he takes the same careful approach with ‘growing’ his fellows and takes great joy in watching them bloom.”

UCSF Lifetime Achievement in Mentoring Award Nominee
“During the launching of my career, [she] was like a Solid Rocket Booster, ensuring that I achieve the lift and trajectory to make it into orbit. But rather than dropping off at that point, she has remained a constant feature, like Mission Control, monitoring my progress.”

UCSF Mentee
“Most importantly, (my mentor) has no intellectual jealousy. She was always happy to see others succeed, pushing them forward into the limelight while standing back in the shadows herself.”

UCSF Mentee
Successful and Failed Mentoring Relationships

Characteristics of Successful and Failed Mentoring Relationships: A Qualitative Study Across Two Academic Health Centers
Sharon E. Straus, MD, Mallory O. Johnson, PhD, Christine Marquez, and Mitchell D. Feldman, MD

Abstract

Purpose
To explore the mentor–mentee relationship with a focus on determining the characteristics of effective mentors and mentees and understanding the factors influencing successful and failed mentoring relationships.

Method
The authors completed a qualitative study through the Departments of Medicine at the University of Toronto Faculty of Medicine and the University of California, San Francisco. They conducted semi-structured interviews with 54 faculty members and identified a number of themes, including the characteristics of effective mentors and mentees, actions of effective mentors, characteristics of successful and failed mentoring relationships, and tactics for successful mentoring relationships. Successful mentoring relationships were characterized by mutual respect, open communication, and the ability to tackle challenges together. Failed mentoring relationships were marked by conflicts of interest, personality differences, perceived (or real) competition, and the mentor’s lack of experience.

Results
The authors completed interviews with 54 faculty members and identified a number of themes, including the characteristics of effective mentors and mentees, actions of effective mentors, characteristics of successful and failed mentoring relationships, and tactics for successful mentoring relationships. Successful mentoring relationships were characterized by mutual respect, open communication, and the ability to tackle challenges together. Failed mentoring relationships were marked by conflicts of interest, personality differences, perceived (or real) competition, conflicts of interest, and the mentor’s lack of experience.

Conclusions
Successful mentorship is vital to career success and satisfaction for both mentors and mentees. Yet challenges continue to inhibit faculty members from receiving effective mentorship. Given the importance of mentorship on faculty members’ careers, future studies must address the association between a failed mentoring relationship and mentor’s lack of experience.

Characteristics of Successful and Failed Mentoring Relationships: A Qualitative Study Across Two Academic Health Centers.
Straus, Sharon; Johnson, Mallory; Marquez, Christine; Feldman, Mitchell
DOI: 10.1097/ACM.0b013e31827647a0
Characteristics of Successful Mentoring Relationships

- **Reciprocity**
  - *it’s got to be a two-way street. It can’t just be a one-way giving relationship ‘cause then it’s just going to burn out.*

- **Mutual Respect**

- **Clear Expectations**
  - “It’s helpful to set up sort of those guidelines in the beginning, what the mentee can expect from the relationship but also what the mentor expects...”

- **Personal Connection**

- **Shared Values**
Characteristics of Failed Mentoring Relationships

- **Poor Communication**
  - *If there’s a lack of communication for, you know, what the mentor expects and what the mentee expects, that’s a recipe for disaster.*

- **Lack of Commitment**

- **Personality Differences**
  - *If the personality types are very different, the way they look at the world could be quite different.*

- **Perceived (or real) competition and COI**
  - *If there’s any other agenda or ulterior motives I think it can really poison the relationship ‘cause you’re not sure if the advice you’re getting is good for you or good for them.*

- **Lack of Experience/Knowledge/Skills**
Active Listening: The Key Skill in Effective Mentoring

“The single biggest problem in communication is the illusion that it has taken place”

George Bernard Shaw
Checklist for Mentees

1. Find a mentor . . . or two
2. Clarify your values and goals
3. Take charge of the relationship
4. Know when to move on
“Will you be my mentor . . .”

As a new fellow, you are looking for a research mentor to work with you on a new project idea. Your fellowship director suggested a few potential faculty mentors but you are not sure how to go about asking them to work with you. You need some advice...
1. Finding a Mentor . . . or two

- **Competence**
  - ✓ Professional and interpersonal skills, knowledge, and experience

- **Confidence**
  - ✓ Shares network, resources and credit
  - ✓ Provides opportunities, supports risks

- **Commitment**
  - ✓ Invests time and energy to mentoring
  - ✓ Mentor should be available and accessible
Acquiring Mentors

- Ask around—what is the mentors track record in working with other fellows
- Schedule a meeting–
- Mutual interview– is there a fit of interests? Chemistry? Potential for reciprocity?
- Be specific– what do you need from this mentoring relationship? What kind of mentor are you looking for?
- Be clear on frequency of meetings, mode of communication
- Plan to re-evaluate at the end of 6-12 months—give and receive feedback
2. Clarify values and goals: 
*Nine Step Strategy for Mentees*

1. Clarify your governing values
2. Prioritize your values
3. Identify your strengths
4. Where do you want to be 10 years from now? (consistent with values?)
5. How will you get there (1, 3, 5 year goals)
6. What skills or tasks do you need to achieve your one year goals?
7. Write a learning contract for each task.
8. Involve your mentor.
9. Repeat steps 6 and 7 for 3 and 5 year goals.

(Pololi, 2006)
3. Take Charge of the Relationship

- “The mentee is not an empty vessel receiving the mentor’s advice and wisdom but, rather, an active participant, shaping the relationship.”

Zerzan et al. 2009
Mentees Should Learn to “Manage Up”

- “Managing up” -- the mentee takes ownership of and directs the relationship, letting the mentor know what he or she needs . . . Managing up makes it easier for a mentor to help a mentee, which makes the relationship more satisfying and successful for both.”
Assemble and Manage a Mentoring Team

- **Career Mentor**: Responsible for overall career guidance and support for their mentee.

- **Research (Scholarly) Mentor**: Responsible for developing the creative and/or independent research careers of their mentees. Unlike the career mentor, the scholarly mentor *must* have expertise in the mentee’s area of scholarship and help provide resources to support the mentees work.

- **Co-Mentor/Clinical Mentor**: Works with the mentee and scholarly mentor to provide specialized content area or methodological expertise.
Mentoring Team

- Co-Mentor(s)
- Career Mentor
- Research Mentor
- Mentee
- Advisors
- Peer Mentors
4. Know when to move on

- Meet annually to assess mentorship to date – ask for and give feedback
- Be clear– what are your needs now—do you and the mentor want to continue the relationship for another year
- Most mentoring relationships end through mutual neglect rather than mutual agreement – don’t let that happen to you.
The IDP is Your Career Compass
The Individual Development Plan (IDP)

- Self evaluate values, skills and interests
  - ✓ Research/scholarly
  - ✓ Clinical
  - ✓ Teaching/mentoring
  - ✓ Leadership/management
  - ✓ Interpersonal
- Set short and long term goals
- Review q 6 months w mentor
The Individual Development Plan

- **Individual Development Plans (IDPs)** provide a planning process that identifies both professional development needs and career objectives.

- Furthermore, IDPs can serve as tools to help facilitate communication between mentees and their mentors.
IDP Goals

Goals

- An IDP can be one component of a broader mentoring program and can help mentees identify:
  - Long-term career options they wish to pursue and the necessary tools to meet these goals
  - Short-term needs for improving current performance
IDP Process

Outline of the IDP Process

• The development, implementation and revision of the IDP require a series of steps to be conducted by the mentee, and then discussed with his/her mentor.

• These steps are an interactive effort, and ideally both the mentee and his/her mentor will fully participate in the process.
IDP – 3 Steps to Success

- **Step 1  Conducting a Skills-assessment:** Conduct an assessment of your strengths, weaknesses, and skills; then ask your mentor/colleague to review your skills assessment with you.

- **Step 2  Completing the IDP:** State your career goals and write your Annual IDP.

- **Step 3  Implementing your IDP:**
  - Set an appointment with your mentor.
  - Discuss your IDP with your mentor;
  - Implement the steps in your IDP;
  - Periodically review progress with your mentor.
**STEP 1: SKILLS ASSESSMENT**

Assess your **strengths, weaknesses and skills** – Self-Evaluation

Evaluate your skills and abilities in the following areas where:

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<th>5 = Highly proficient</th>
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<th>General Research Skills:</th>
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<td>Designing program evaluations/studies</td>
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<td>Mentoring skills</td>
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<td>Being a mentee</td>
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<td>Leading and motivating others</td>
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Step 2 – Evaluate Progress and Set Goals

- What are your professional goals for the upcoming year?
- What progress have you made with your prior goals?
- What are your long-term career goals?
- What are some motivating factors for pursuing these goals?
- Time management – how do you allocate your time at work?
- What further research skills do you need to be successful in the next step of your career?
- Create a monthly time-line for your goals
Step 3: Implement Your Plan

• Keep the IDP on your desk-top

• Each major professional goal should be broken down into its smaller, accomplishable sub-goals, steps or “deliverables”, with specific dates for completion

• For example: Major goal: Submit a paper for publication.
  – Sub-goal #1: Complete data analysis, figures and outline.
  – Sub-goal #2: Complete the Introduction section.
  – Sub-goal #3: Complete the Discussion section.
Step 3: Implement Your Plan

- Revise and modify the plan as necessary.
- Meet with your mentor to review and discuss your IDP. Be sure to prepare a written outline for this discussion. For example, create a prioritized list of the most important items you wish to discuss.
- Revise your IDP on the basis of these discussions.
Take Home Points for Mentees

- Mentoring is key to career success and satisfaction
- Invest time in finding the right mentor(s)
- Be proactive – take charge of the relationship and learn to ‘manage up’
- Mentoring is reciprocal – look for opportunities to teach your mentor (and give feedback)
- Take time to reflect on your values, skills and goals – this will form the foundation for decision-making
- Use an IDP
“Meaning is not something you stumble across, like the answer to a riddle or the prize in a treasure hunt. Meaning is something you build into your life. You build it out of your own past, out of your affections and loyalties . . . out of your own talent and understanding, out of the things you believe in, out of the things and people you love, out of the values for which you are willing to sacrifice something.”

John Gardner
Thank You