Early Career Faculty Mentoring Handbook

UBC Faculty of Medicine

This Handbook and accompanying Worksheets and Self Study Package have been designed first and foremost to address the obvious questions that arise when embarking on a new mentoring relationship—What is mentoring? What are the benefits? How do I give it? How do I get it?. It is based on the latest research on mentoring in the field of medicine, and tailored more specifically to the UBC Faculty of Medicine.

I. Introduction to Mentoring

A. What is Mentoring?

1. Definitions from the litearature:

> "Mentoring is best described as a reciprocal and collaborative learning relationship between two (or more) individuals who share mutual responsibility and accountability for helping a mentee work toward achievement of clear and mutually defined learning goals. Learning is the fundamental process, purpose, and product of mentoring" (Zachary 2004).
>
> Mentoring must be a no-fault relationship that either party has the ability to terminate at any time given a well-founded reason without risk to the career of either party.

2. Models of Mentoring

Models of mentorship generally include:

- One-on-one mentoring: classic, face-to-face mentoring between senior mentor(s) and early career faculty mentee(s)

- Mentoring of early career faculty at distributed sites using alternate methods of communication

- Group mentoring: a small group of mentees supervised by a mentor

- The multiple-mentor experience model: individual or group mentoring with a number of mentors

- Peer mentoring: mentoring among co-equals

The UBC Faculty of Medicine recommends that potential mentors and mentees reach an agreement as to what model of mentoring is most appropriate. While mentorship models may differ within Departments, Schools and Programs, the core component is the identification of a mentor(s) for all early career faculty members within their the first academic or clinical appointment.

3. Similar Kinds of Relationships

Although many kinds of relationships are similar in many ways to a mentoring relationship, and may even overlap, it is important for both parties in a mentoring relationship to keep in mind the nature of their relationship.

3.1 Coaching is not Mentoring

Coaching has evolved into two distinct types. Executive Coaching, where the focus is on organizational

and professional goals, and Personal Coaching, where the focus is on personal development and goals. Although both mentoring and coaching focus on expanding individual potential and on the achievement of personal and/or professional development goals, mentoring typically requires the mentor to have internal working knowledge of the organization that will be useful to the mentee. Coaching requires no such knowledge and allows the client to successfully explore goals and challenges through curiosity based questions.

3.2 Counselling is not Mentoring

Counselling and mentoring share many similarities, including engaging in reflective practices to increase self-awareness, and facilitating personal goal achievement. However, while counselling attempts to resolve deep underlying issues, mentoring puts forward a more practical agenda including setting goals, creating plans of action, and problem solving.

3.3 Friendship is not Mentoring

Although an early career-senior mentoring relationship can certainly be cordial, personal, and enjoyable, the power balance can never be equal. Mentor- mentee pairs should avoid establishing a relationship as friends and maintain appropriate professional distance during the mentorship period.

4. Mentoring for Clinician-Educators:

Clinician-educators are at an increased risk of inadequate mentorship and have reported that they are less likely to consider themselves mentored than clinician-scientists.

- The following contributing factors have been identified:
- Mentoring has historically been associated with researchers and clinician-scientists
- Clinician-scientists have relatively objective means of measuring academic productivity and

promotions committees can use numeric guidelines to gauge progress

- In contrast, until recently, objective means of measuring academic productivity for clinician-educators were ill-defined
- Further, there is evidence that mentors in medical education may have been few or hard to find.

Early career faculty identified as educator-scholars in the UBC Faculty of Medicine have the opportunity of mentoring provided through the Centre for Health Education Scholarship.

B. Who Benefits from Mentoring?

Early career faculty members at all stages in their careers can benefit from mentoring but those who need it most are those who are:

- New to an organization or position
- Concerned with their career plans
- Being developed for future leadership positions
- Experiencing professional or personal difficulty
- Experiencing cultural barriers at work

In addition, senior mentors should be willing to seek ongoing mentoring as they develop new life and professional skills and advertise their continual par-

ticipation as life-long learners. They may also seek mentoring if they wish to change their career focus or professional path while they already hold high positions within their institution.

C. Mentoring of New Faculty at UBC Faculty of Medicine

1. Vision

New faculty members will have a welcoming and supportive relationship with an established academic mentor throughout the initial years of their appointment at UBC and until promotion to Associate Professor. Successful mentors will support and challenge their mentees. They will provide security based on trust and share their wisdom and experiences.

2. Objectives

The primary objective is to provide a forum for faculty members to share their wisdom and experience. In mentoring early career faculty members, senior colleagues may help their mentee(s) to:

1. Understand and navigate an academic environment

2. Mature successfully in their new role as faculty members, including obtaining the necessary knowledge of the assumptions, expectations and deliverables that are required for career success

3. Meet leaders and others in the institution in order to establish and maintain a productive network of colleagues

4. Successfully manage an academic career

5. Achieve tenure and first promotion

6. Develop goals and action plans for new milestones such as promotion, Tri-Council funding, and/or teaching excellence

7. Develop the skills to become future mentors

In addition, at the department or Faculty level, mentoring can:

- Facilitate a team approach to successful development of early career faculty

- Enhance departmental morale

- Contribute to the recruitment and retention of the best early career faculty members

- Help to create mechanisms for rewarding contributions leading to success in early career colleagues

II. The Impact of Mentoring

A. On the Mentee

Most research regarding the impact of mentoring in medicine focuses on the impact of mentoring on the mentee. According to studies, positive mentoring experiences can:

- Increase the likelihood of receiving grant funding

- Influence the shaping of an academic persona

- Aid in the choice and fulfillment of career path
- Increase the likelihood of achieving a promotion
- Increase time spent on research
- Improve research skills
- Increase number of publications
- Increase self-assessed confidence
- Increase overall career satisfaction
- Aid in socialization into the profession
- Aid in the development of values and an ethical perspective
- Improve communication skills

B. On the Mentor

Mentoring can positively impact the mentor by:

- Providing a sense of satisfaction derived from the mentee's progress
- Providing a sense of pride in developing the next generation
- Providing the opportunity to disseminate expertise and skills
- Enhancing collegiality between early career and senior faculty

C. On the Organization

Good mentoring can also:

- Result in better care for patients
- Aid in the development of clinical governance
- Provide an opportunity to air potential problems at an early stage
- Aid in building a network of professional collaborators within the organization
- Aid in faculty retention

D. Pitfalls to Avoid

Classic one-on-one mentoring between a senior mentor and early career mentee is inherently hierarchical and as such has exploitative potential. Though not generally the focus of research, the negative impacts related to this power imbalance inherent in traditional on-on-one mentoring have been identified as follows:

- Senior mentors may use early career faculty to promote their own research and careers
- Unless clearly stated ahead of time, senior mentors and early career faculty may encounter difficulties in determining who gets credit for work produced cooperatively
- The mentee is placed in the potentially stigmatic position of "help-seeker," which involves "a loss

of personal autonomy and weakening self-efficacy"

III. Roles in the Mentoring Relationship

A. Role of the Mentee

1. Advice From the Literature

"Finding a mentoring relationship that works for both parties requires patience and perseverance. Mentees may find that many people, rather than one person, fill the mentoring role. The specific person who becomes the mentor may not be as important as the functions that this person (or persons) serves for the mentee" (Jackson et al. 2003, 331).

Finding a successful mentoring relationship requires that the mentee audition many different potential mentors in order to ensure a good match

"Mentees should be explicitly aware of the personal and professional qualities that they value in a mentor and discuss these with potential mentors to find the right match" (Jackson2003, 333).

Mentees should remember that mentoring relationships are with a more senior faculty member which can result in power indifference that could render the mentee vulnerable.

"It is important that mentees not simply tell mentors what they think mentors wish to hear, but rather what they really think, without wasting time pursuing unwanted directions" (Detsky and Baerlocher 2007).

2. Program Expectations

In the UBC Faculty of Medicine Mentoring Program, mentees are encouraged to:

- Accept personal responsibility for career development;
- Set goals and timetables for completion of projects and invite reflections on progress towards them. These action plans can be reviewed at each mentor/mentee meeting;
- Be open to suggestions, advice, feedback;
- Listen and ask questions;
- Be open about thoughts and feelings, provide feedback on what works and what doesn't;
- Undertake honest self-assessment regularly;
- Share mistakes and perceived areas for improvement;
- Identify barriers to goal achievement and provide potential solutions;
- Maintain confidentiality of relationship; and
- Commit time and energy to mentor/mentee relationship
- Participate in evaluation of program annually (brief survey)

B. Role of the Mentor

1. Advice from the literature:

> "...successful mentoring is less distinguished by innate personality than by supportive behaviours" (Rabatin 2004).
>
> "One of the most important functions of a mentor is to teach the rules of career advancement. These rules are seldom written down and sometimes inscrutable" (Lee2005).
>
> "Good intentions and knowledge and experience of a subject are not sufficient pre-requisites for good mentoring. For good mentoring it is important that the approach of the mentor is constructive and non-judgemental and the process is positive, facilitative, and developmental. A good mentor should also have good interpersonal skills, adequate time, an open mind and willingness to support the relationship" (Taherian 2008).

2. Program Expectations:

In the UBC Faculty of Medicine Mentoring Program, mentors are encouraged to:

- Meet with mentee at least twice per year to discuss career goals and progress

- Document that meetings have occurred and file with the Department Mentoring Advisor

- Maintain confidentiality regarding shared information

- Be prepared to advocate on candidate's behalf if required and with the mentee's permission

- Participate in any evaluation of program annually (brief survey)

- Avoid abuse of power

- Help to build professional networks

- Hold a high standard for mentee's achievement

- Recognize the mentee's potential and envision possibilities

- Protect the mentee from sometimes harsh interactions in academe

- Help the mentee gain access to otherwise closed academic circles

- Teach the mentee to promote him/herself

3. Characteristics and Qualifications for Mentors at UBC:

- Associate or Full Professor, Senior Instructor or Clinical equivalent, possibly from a Division/Program other than that of the mentee

- Interested in being a mentor

- Must understand departmental and faculty organization, academic procedures, and possible sources of external support

- Willing to make time for this endeavour (minimum 2 meetings per year)

Given the confidential relationship between a mentor and mentee, a mentor may wish to avoid being placed in an evaluating role, i.e. by opting out as a member of a department promotions and tenure committee when the mentee is being discussed.

C. Role of the Organization

1. Advice from the literature:

> "The best chance for fulfilling the promise of mentoring within organizations today...lies in creating a mentoring culture. Organizations must create readiness, provide opportunities, and build in support so that mentoring can have a profound, deep, and enduring impact on their people" (Zachary 2005, 2).

2. Program Expectation of Departments/Schools at UBC:

2.1 Department Head/School Director

- Identify an Advisor for the mentoring program

- Promote the program within Department or School

- Recruit mentors (including Centre Directors)

- Make the final decision regarding mentor/mentee pairs

- Host events to celebrate the program (possibly in conjunction with Centres and/or other Departments) and recognize mentors on annual basis.

- Include mentors in annual reports

Given the prescribed role of the Head/School Director in mentoring of early career faculty for promotion and tenure, and chairing promotion and tenure committees, it is strongly recommended that department Heads/School Directors DO NOT act as formal mentors of early career faculty within their own Department/School.

2.2 Department Mentoring Advisor

- Work with Department Head/School Director to implement the program and determine recognition mechanisms for mentors

- Attend meetings of working group during implementation phase and provide feedback to assist in successful implementation

- Coordinate annual evaluations of the program within the Department/School for the Faculty Career Development Committee.

- Facilitate resolution of unsatisfactory mentor/mentee relationships

IV. Identifying a Mentor

To assist potential mentees with their search, the UBC Faculty of Medicine website offers a directory of qualified, volunteer mentors accessible at:

http://www.med.ubc.ca/faculty_staff/mentoring/mentorSearch.htm

The Department Head/School Director and the Department Mentoring Advisor will assist you in identifying appropriate mentors and help initiate their first meeting.
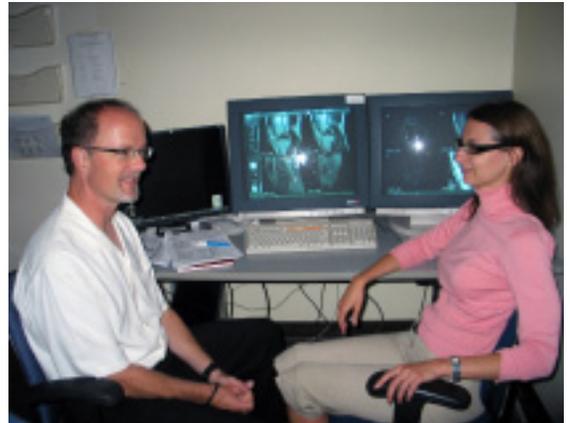
V. Practical Questions for Mentors and Mentees

1. Questions New Faculty Members Should Ask

Based on the 1999 retreat of UBC Faculty organized by TAG, the following are suggested as some of the questions new faculty members may want to ask Department Heads/School Directors and Mentors. They are organized by topic. Some questions may be best dealt with by Department or Faculty Administrators, as indicated below.

a. Job
Review expectations of Department Head re: position.

1. How do I get tenure?
2. What is performance appraisal system, i.e. nature, frequency?
3. How often are we going to meet and should I or the Department Head/School Director initiate it? (or mentor)
4. To whom do I go for help if I have a problem with my School Director/Department (or Division) Head? (safe person)
5. What about support staff/secretarial time?
6. Do I have a budget to work with?
7. What committees should I belong to?
8. Am I responsible for covering my own teaching?
9. Must I cover for others?

b. IT & Library
Your Department Administrator would be the first contact for IT and Library questions, with the exception of number 1 below, which you might wish to discuss with several people including your Department Head, mentor, and colleagues.

1. Which listservs should I belong to (and URL bookmarks)?
2. What library resources are there? How do I get the library to order materials? To whom do I complain if my journal is cancelled? How soon must I order reserve materials? [What services are provided by the library at the College of Physicians and Surgeons of BC?]
3. Who is the library liaison for the faculty?
4. How do I order texts from the bookstore?
5. How do I get email/internet?
6. Who is the IT contact person?

c. Logistics

Your Department Administrator should be able to help you with these questions or to direct you to someone who can.

1. What is available to orient me campus-wide?
2. Where do I get keys and how do I get parking?
3. Where do I get ID? (teaching hospital)
4. What are the safety regulations (fire, safety & WCB)? What are the resources and facilities for parking in university activities beyond my department?
5. What union contracts are we obliged to honour? What about personal security issues, i.e. working late hours?
6. What about car pooling, ride sharing, other transportation?
7. What about shuttle service from campus to teaching hospitals?

d. Support

1. What funds are available?
2. What practical guidelines exist for me?
3. What resources are available to support me re: equity, unfair criticism?

e. Benefits

Department or Faculty Administrators should be able to answer most questions regarding benefits. Questions regarding availability, i.e. are there limitations as to when I can take my holidays, or;

1. What are the expectations if I get sick (or my child/parent gets sick)? Should be discussed with your Department/Division Head/School Administrator.
2. How do I get financial advice to manage my pension plan?
3. What about holiday time?
4. What about housing plans/loans?
5. What about health/dental benefits?
6. What about long-term sick time?
7. What about maternity/paternity leave?

Questions Department Heads/School Directors or Mentors Should Ask

Based on the 1999 retreat of UBC Faculty organized by TAG, the following are suggested as some of the questions Department Heads/School Directors and Mentors may want to ask new faculty members. The format for the meeting may also include explanations as well as suggestions. The questions are organized by topic.

a. Pay

1. Salary/Are you getting paid?
2. What questions do you have about benefits?

b. Support

1. Have you met other faculty?
2. Are you aware of grants for new faculty and mentoring opportunities?
3. What questions do you have about University facilities?
4. What questions do you have about orientation? What questions do you have about mentoring? What questions do you have about teaching support?
5. What questions do you have about support for faculty?

c. Logistics

1. What questions do you have for the Equity office?
2. What questions do you have about practical concerns – keys/parking?

d. General

1. What do you need to know about?
2. What questions do you have about teaching?
3. What questions do you have about summer teaching?
4. What questions do you have about teaching responsibility?

e. Teaching Details

1. What questions do you have about student behaviour?
2. What questions do you have about marking?
3. What questions do you have about course preparation?
4. What questions do you have about student advising?
5. Do you know what to do if a book you want students to read is out of print?
6. Do you know about the bookstore's course packages?
7. Are you familiar with Cancopy, the licensing agency for copyright?
8. Do you know about the Disability Resource Centre (Access and Diversity) for students and faculty needs? Are you aware of the need to accommodate students and faculty with disabilities?
9. Have you satisfactory office & lab/space and equipment?
10. What is your research focus?
11. What questions do you have about tenure?
12. What questions do you have about committee work?

13. What questions do you have about office hours?
14. What do you need to accomplish your job?
15. What questions do you have about academic regulations.
16. What questions do you have about hospital regulations?
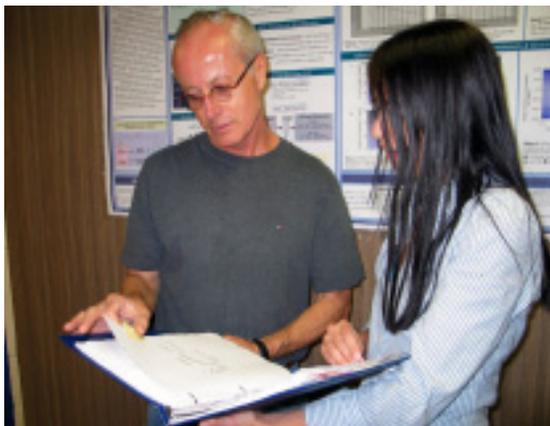
VI. Documenting Meetings of Mentors and Mentees

The only required documentation of meetings between mentors and mentees is the "Mentorship Meeting Documentation Form" (see next).

MENTORSHIP MEETING DOCUMENTATION FORM

(To be signed and sent to the Department Mentoring Advisor after every meeting)
This is to confirm that a mentorship meeting took place

SIGNATURES

Mentee: _____

Mentor: _____

Date: _____

Place: _____

VII.   UBC Faculty of Medicine Mentorship Timetable

Events	Milestones	Chronology
Faculty Appointments	**Appointment of mentors:** -Academic Mentor for all appointees. -Scientific Mentor for all appointees with >50% research time.	Within 1st month of appointment
Mentor/Mentee Interactions	**1st meeting between mentor and mentee:** -Report of meeting to file with career development office. -Copy to chair who will decide further distribution of report.	Within 1st three months of appointment
	2nd-4th meetings: -Regular quarterly meetings -Report (see above)	Within 1st twelve months of appointment
	5th-nth meetings: -A meeting every 3-4 months -Report (see above)	
Review of Mentor	**Report from mentee and Division Head to Career Development Office:** -Reappointment or appointment of new mentor	Within year 1, and biannually thereafter
Graduation of Mentee	**Promotion to Associate Professor**	

VIII. Useful Web Sites

Highly recommended for general information:

http://www.medicine.ubc.ca/about/new_member/RG.htm
http://www.skylight.science.ubc.ca/survivalguide
http://www.med.ubc.ca/faculty_staff/mentoring.htm

Recommended for specific purposes:

http://www.research.ubc.ca/
http://www.research.ubc.ca/Orientation.aspx
http://www.hr.ubc.ca/benefits/employment_group/faculty/issues
http://www.hr.ubc.ca/vwc/quickstart/

IX. References

Works Consulted in Section I

Buddenberg-Fischer B., Herta K.D. (2006). Formal Mentoring Programmes for Medical Students and Doctors–a Review of the Medline Literature. Medical Teacher 28(3), 248-257.

Chew L.D., Watanabe J.M., Buchwald D. & Lesser D.S. (2003). Junior Faculty's Perspectives on Mentoring. Academic Medicine, 78, 652.

Connor, M.P. et al. (2000). Developing Senior Doctors as Mentors: a Form of Continuing Professional Development. Report of an Initiative to Develop a Network of Senior Doctors as Mentors: 1994-99. Medical Education, 34, 747-753.

Detsky A.S., Baerlocher M.O. (2007). Academic Mentoring-How to Give it and How to Get it. JAMA, 297(19), 2134-2136.

Farrell, Susan E. et al. (2004). Mentoring for Clinician-Educators. Academic Emergency Medicine, 11, 1346-1350.

Files J.A., Blair J.E., Mayer A.P., Ko M.G. Facilitated Peer Mentorship: A Pilot Program for Academic Advancement of Female Medical Faculty. Journal of Women's Health 17(6), 1-7.

Jackson V.A., Palepu A., Szalacha L,. Caswell C., Carr P.L., Inui T. (2003). Having the right chemistry: a

Mayer A.P., Files J.A., Ko M.G., Blair J.E. Academic Advancement of Women in Medicine: Do Socialized Gender Differences Have a Role in Mentoring? Mayo Clinic Proceedings. 83(2), 204-207.

Ramani S., Gruppen L., Kachur E. (2006). Twelve tips for developing effective mentors. Medical Teacher, 28, 404-408.

Taherian, K. & Shekarchian, M. (2008). Mentoring for Doctors: Do its benefits outweigh its disadvantages? Medical Teacher 30(4): 95-e99.

University of New South Wales Mentoring Information Pack (2006). Accessible at: http://www.hr.unsw.edu.au/osds/pdfdocs/Mentoring%20Information%20Pack%20-%205.6.06.pdf

Zachary, L.J. (2005). Creating a Mentoring Culture. Jossey-Bass: San Francisco.

Works Consulted in Section II

Barondess, J.A. (1997). On Mentoring. Journal of the Royal Society of Medicine, 90, 347-349.

Benson C.A., Morahan, P.S., Sachdeva A.K. & Richman R.C. (2002). Effective Faculty Preceptoring and Mentoring During Reorganization of an Academic Medical Center. Medical Teacher, 24, 550-557.

Buddenberg-Fischer B. & Herta K.D. (2006). Formal Mentoring Programmes for Medical Students and Doctors-a Review of the Medline Literature. Medical Teacher, 28(3), 248-257.

Bussey-Jones et al. (2002). Repaving the Road to Academic Success: The IMeRGE Approach to Peer Mentoring. Academic Medicine, 81(7), 674-679.

Detsky, A.S. & Baerlocher, M.O. (2007). Academic Mentoring-How to Give it and How to Get it. JAMA, 297(19), 2134-2136.

Drossman, D.A. (2007). On Mentoring. American Journal of Gastroenterology, 102, 1848-1852.

Jackson, V.A., Palepu, A., Szalacha, L., Caswell, C., Carr, P.L. & Inui, T. (2003). Having the Right Chemistry: a Qualitative Study of Mentoring in Academic Medicine." Academic Medicine, 78, 328-334.

Morzinski J.A., Diehr S., Bower D.J. & Simpson D.E. (1996). A Descriptive, Cross-Sectional Study of Formal Mentoring for Faculty. Family Medicine, 28, 434-438.

Palepu A., Friedman R.H., Barnett R.C., et al. (1996). Medical Faculty with Mentors are More Satisfied. Journal of General Internal Medicine, 11(4 suppl), 107.

Poloi L.H., Knight S.M., Dennis K. & Frankel R.M. (2002). Helping Medical School Faculty Realize Their Dreams: an Innovative, Collaborative Mentoring Program. Academic Medicine, 77, 377-384.

Ponce A.N., Wiilliams, M.K., Allen G.J. (2005). Toward Promoting Generative Cultures of Intentional Mentoring Within Academic Settings. Journal of Clinical Psychology, 61(9), 1159-1163.

Taherian, K. & Shekarchian, M. (2008). Mentoring for Doctors: Do its benefits outweigh its disadvantages? Medical Teacher 30(4): 95-e99.

Wingard D.L., Garman K.A. & Reznik V. (2004). Facilitating faculty success: Outcomes and Cost Benefit of the UCSD National Center of Leadership in Academic Medicine. Academic Medicine, 79(10suppl), S9-11.

Wise M.R., Shapiro H., Bodley J., Pittini R., McKay D. & Willan A. (2004). Factors affecting academic promotion in obstetrics and gynecology in Canada. Journal of Obstet. Gynaecol Can., 26, 127-136.

Young G. (1999). Mentoring should be more widespread. BMJ 319, 812-853.

Works Consulted in Section III

Detsky, A.S. & Baerlocher, M.O. (2007). Academic Mentoring-How to Give it and How to Get it. JAMA, 297(19), 2134-2136.

Farrell, Susan E. et al. (2004). Mentoring for Clinician-Educators. Academic Emergency Medicine, 11, 1346-1350.

Jackson, V.A., Palepu, A., Szalacha, L., Caswell, C., Carr, P.L. & Inui, T. (2003). Having the Right Chemistry: a Qualitative Study of Mentoring in Academic Medicine." Academic Medicine, 78, 328-334.

Lee, J.M.; Anzai, Y. & Curtis, P. Langlotz (2006). Mentoring the Mentors: Aligning Mentor and Mentee Expectations. Academic Radiology, 13(5), 556-561.

Lingham, S. & Gupta, R. (1998). Mentoring for Overseas Doctors. BMJ Career Focus, 317, 11 July.

Ramanan, R., Phillips, R., Davis, R., Silen, W. & Reede, J. (2002). Mentoring in Medicine: Keys to Satisfaction. American Journal of Medicine, 112, 336-41.

Souba, W.W. (1999). Mentoring Young Academic Surgeons, our Most Precious Asset. Journal of Surgery Res., 82,113-120.

Zachary, L.J. (2005). Creating a Mentoring Culture. JosseyBass: San Francisco.

X. Optional Guides for Mentors and Mentees

Mentoring Toolkit
The following toolkit can help you get the most out of your mentoring relationship. 1. The GROW Model of Mentoring 2. Sample Mentoring Agreement 3. Tools for Mentors 4. Tools for Mentees

1. GROW Model of Mentoring

The GROW Model of Mentoring is reprinted here with generous permission from the University of New South Wales, NSW Australia. The entire UNSW Mentoring Toolkit is available for download at: http://www.hr.unsw.edu.au/osds/leadership/mentoring.html.

This model is designed to guide mentor and mentee thorough a session efficiently.

Reviewing the model will help both the mentor and mentee prepare for a session, and can be used along with the Mentorship Report to provide a useful structure to the discussion. A number of questions have been provided at each stage of the model, however they are suggested questions only, and it is important to adapt them to your own style to ensure an effective mentoring session. Each mentoring session should work through each part of the GROW process.

You may find it helpful to use the included GROW form to either prepare for or document meetings.
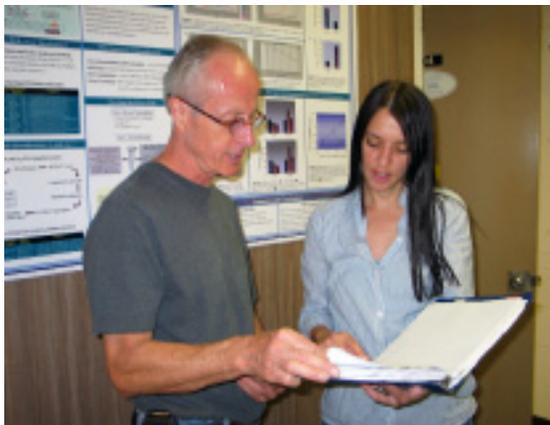
1.2 Using the GROW Model of Mentoring

GOALS	**R**EALITY	**O**PTIONS	**W**RAP UP

Step 1: GOALS
Set goals, write them down, establish what person wants out of the session

- What do you want to achieve out of this mentoring session/ relationship?

- What are the goals you want to achieve? (Make sure the goals are SMART i.e. specific, measurable, action oriented, realistic, time limited)

- What do you hope to achieve through this goal?

- What would make this goal even more meaningful for you?

- Which of your values do you need to consider when setting this goal?

- On a scale from 1 to 10 how committed are you to this goal?

- What are the expectations of others?

- Who else needs to know about your goal? How will you inform them?

Step 2: REALITY
Let them tell their story, invite self assessment, what's happening, when does this happen, what effect does it have, other factors

- What is the context of the current situation? Tell me what is happening in regard to this goal at the moment.

- Tell me some more about that...

- What has stopped you from reaching this goal in the past?

- Do you know anyone who has achieved that goal?

- What can you learn from them?

- On a scale from 1 to 10 how severe/serious/urgent...is the situation?

Step 3: OPTIONS
Brainstorm options, ask – don't tell, empower, ensure choice, how can you move toward the goal, what has worked in the past

- What could you do as a first step?

- What else could you do?
- What would happen if you did nothing?
- What has worked for you in the past?
- How could you do more of what works for you?
- Who can support you in making this change?
- How could you redesign your work environment to support you in implementing this goal?
- What could you change or eliminate in your environment that is holding you back?
- What are the costs and benefits of this goal?

Step 4: WRAP UP
Identify specific steps and any obstacles, write action plan

- Where does this goal fit in with your personal priorities at the moment?
- What obstacles do you expect to meet? How will you overcome them?
- What steps do you need to take to achieve this?
- What are you going to do?
- How can I help you in moving forward?

Optional Preparation and Documentation Tool for Mentoring Meetings using the GROW Model

Goal: _____

Reality

1. Accomplishments to date:
_____
_____
_____
_____

2. New challenges:
_____
_____
_____
_____

Options
_____
_____
_____
_____

Wrap-up

1. Strategies to achieve goal:
_____
_____
_____
_____

2. Evidence of progress: How will you know you're making progress?
_____
_____
_____
_____

3. Milestones: Sketch a brief timeline of milestones:
_____

2. Sample Mentoring Agreement

The following is a sample mentoring agreement. A mentoring agreement between mentors and mentees entering into a new mentoring relationship can empower both parties, and avoid problems further down the line. We recommend that you review and consider expanding on the below model at the first meeting.

Mentoring Agreement
Mentor Name:
Mentee Name:
Purpose and desired outcomes of the mentoring relationship: Activities to be conducted: Expectations: Communication methods and frequency: Actions to take if problems arise:
I agree to enter this mentoring relationship as defined above and will maintain confidentiality.

Date:	Mentor Signature:
Date:	Mentee Signature:

3. Tools for Mentors

3.1 Drawing on Prior Experience

Used thoughtfully, the following questions can help new mentors to prepare for an initial meeting with a new mentee, or as a refresher later in the relationship.

Instructions:

Take a couple of minutes to think about your past mentoring experiences and write brief answers to these questions. A mentoring experience can, but need not be a formal institutional mentoring experience.

1. Identify the three most important mentors in your life.

_____
_____
_____
_____
_____

2. Why did you pick these three? What made the experience worthwhile and meaningful?

_____
_____
_____
_____
_____

3. What lessons can you bring to your new role as a mentor?

_____
_____
_____
_____
_____

Adapted from: Zachary, L.J. (2005). *Creating a Mentoring Culture*. JosseyBass: San Francisco.

4. Tools for Mentees

4.1 Mentee Expectations
The following checklist can help mentees to get the most out of an initial meeting with a potential mentor, and help you develop an understanding of what you expect to gain from your mentoring relationship. Add your own items whenever you do not find them listed.

The reasons I want a mentor are to:
- Receive encouragement and support from senior faculty

- Get advice on how to balance work and other responsibilities and set priorities

- Increase my confidence

- Network

- Challenge myself to achieve new goals and explore alternatives

- Gain knowledge of the unwritten "do's and don'ts"

- Gain a realistic perspective of the academic workplace

I want my mentor and I to:
- Tour his/her facilities, learn about his/her projects and activities

- Go to educational events such as lectures, talks, documentaries

- Go to formal mentoring events

- Meet over coffee, lunch, or dinner

- Go to local professional meetings

I want my mentor and I to discuss:
- Academic activities that will most benefit my future career

- Learning contract renewal and tenure strategies

- Handling evaluations of teaching

- Preparing teaching presentations

- Promotion preparation

- My work

- How to network

- Working with the Department Chair

- How to manage work and home life

- Writing for publication

- Developing and funding research

- Balancing and using time effectively

- Getting resources to support professional development

The things I feel are off limits in my mentoring relationship include:
- Going to restaurants to meet

- Meeting behind closed doors

- Using non-public places for meetings

- Sharing private aspects of our lives

I hope that my mentor will help me with my professional advancement by:
- Advancement possiblities

- Critiquing my proposals

- Introducing me to people who might be helpful to my advancement

- Suggesting potential professional contacts for me to pursue on my own

- Helping me prepare for promotions

Adapted from New Mexico State University's ADVANCE Mentoring Program