

# An Abbreviated Guide to Mentor- & Menteeship

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A complete historical, contextual, and evidence-based review of the role (s) and different types of mentor-mentee relationships is beyond the scope of this document. Suffice it to say, that there are numerous types & foci of the mentor-mentee relationship; no one correct, but with many similar tenets. The below will briefly define mentorship, iterate the different types of mentor-mentee relationships/foci, and present a literature-driven amalgamation of the 'Rules of Engagement' for the Mentor as well as the Mentee.

## Mentor Definitions

- Simple
  - A wise & trusted counselor or teacher (Dictionary.com)
  - A trusted counselor or guide (Meriamwebsters.com)
- Complex
  - A complex relationship based on mutual interests and trust, both professional and personal, where both mentor and mentee benefit in some way. Mentees should take an active role in the formation and development of mentoring relationships. Successful mentoring requires the commitment and interpersonal skills of the mentor and mentee, but also a facilitating environment at academic medicine's institutions.
    - (adapted from) Sambunjak J Gen Intern Med. 2009;25(1):72–8
  - An experienced person in a company or educational institution who trains and counsels new employees or students: regular meetings between mentor and trainee help guide young engineers through their early years (Oxforddictionaries.com)

## Different Mentor-Mentee Functions & Relationships

One Mentor does not fit all! Since the mentor must be a knowledgeable guide to direct and mature their mentee, absent of conflict of interest, than clearly mentees must seek out multiple mentors along one's path. Multiple mentors can address similar or different objectives. One can think of mentors in 3 broad domains (Academic Advancement; Institutional Navigation; and Balance) or with a more exhaustive construct (below)

Different Mentor-Mentee Relationships	
Basic	Elaborated†
Academic Advancement <ul style="list-style-type: none"> <li>• Scholarship; Education Development; Promotion, etc)</li> </ul> Institutional/Professional <ul style="list-style-type: none"> <li>• Networking, navigating the local, regional &amp; national system)</li> </ul> Personal / Balance <ul style="list-style-type: none"> <li>• Within the work environment</li> <li>• Between the work and personal environment</li> </ul>	<ul style="list-style-type: none"> <li>• Clinical</li> <li>• System Navigation</li> <li>• Promotion &amp; Tenure</li> <li>• Scholarship</li> <li>• Professional Niche (Help identifying AND protecting)</li> <li>• Educator Development</li> <li>• Balance (within work, between work/home, 'life coach')</li> </ul>

† Ben Hoffman, Dept Pediatrics, OHSU. Professional Development Planning for Faculty Workshop (Doernbechers, Feb 14, 2013)

## Mentorship Issues (in literature- Per Sambunjak 2009)

- Ideal mentor & mentee characteristics
- How to commence a mentor relationship
- How to structure/build a mentor relationship
- Characteristics of a mentor relationship
- Barriers & Solutions to success
- Assessment of Efficacy

## So you want to be a...

Mentor	Mentee
<b>Characteristics</b>	
<ul style="list-style-type: none"> <li>• Available!</li> <li>• Altruistic, sincere, empathetic, honest, trustworthy, altruistic, responsive, non-judgmental, motivating, interested in mentee success, able to clarify mentee needs/goals, good at listening, knowledgeable, 'connected', &amp; accountable</li> <li>• Role model</li> <li>• Has mentor experience (or at least enthusiasm)</li> <li>• More Senior (At least one rank up) vs peer.</li> <li>• Knowledgeable (P&amp;T, grants, authorship, life, etc)</li> </ul>	<ul style="list-style-type: none"> <li>• Must own and drive the process ('manages up')</li> <li>• May need different mentor, for different areas</li> <li>• (Ideally) Self directed</li> <li>• Commitment to succeed (will be required)</li> <li>• Open to learn &amp; receive feedback/advice</li> <li>• Have a plan/prepare for all meetings</li> <li>• Establish clear goals-of-session</li> <li>• Make clear tasks/take-homes &amp; complete them.</li> <li>• Self reflective (liabilities/struggles) &amp; seeks input.</li> </ul>
<b>Structure</b>	
<ul style="list-style-type: none"> <li>• Intra-, vs inter-gender/race/URM etc – cons &amp; pros</li> <li>• Teams vs individuals? Teams may be confusing due to multiple opinions.</li> <li>• May need multiple mentors (Boss ≠ Research ≠ Academic ≠ Personal mentors)</li> <li>• Clear communications &amp; expectations are critical</li> <li>• Personal Connection – likely best when interests/experiences are share (not critical)</li> </ul>	
<b>Barriers</b>	
<ul style="list-style-type: none"> <li>• Inexperienced mentor</li> <li>• Lack of availability (Time &amp; Numbers) <ul style="list-style-type: none"> <li>○ Inadequate numbers of skilled/experienced mentors</li> <li>○ Mentors are oversaturated</li> <li>○ No time/energy for mentor-mentee relationship</li> <li>○ Mentor too busy/focused on other aspects of career (research, clinical, administration)</li> </ul> </li> <li>• Mentor-mentee mismatch <ul style="list-style-type: none"> <li>○ Personality, work styles, gender, ethnicity, Interests, experiences, knowledge, other.</li> </ul> </li> <li>• Mentor taking excess credit / stealing research-ideas</li> <li>• Mentor more concerned with their growth than that of the mentee</li> <li>• Not leaving room for Mentee autonomy/growth</li> <li>• Too authoritarian</li> <li>• Mentor imposing their ideas/research focus on mentee</li> <li>• Inflexible mentor/pre-set notions</li> <li>• Mentor Conflict of Interest <ul style="list-style-type: none"> <li>○ Supervisor; competing interests, salary negotiations, etc.</li> </ul> </li> <li>• No incentive/financial carve-out for mentor time</li> </ul>	<ul style="list-style-type: none"> <li>• Requires courage in self-reflection and receipt of advice</li> <li>• Sense of rejection when mentor cancels meetings</li> <li>• Mentor-mentee mismatch</li> <li>• Short exposure duration (e.g. a rotation , one-year, etc)</li> <li>• Lack of patience (first project often is not successful)</li> <li>• Unprepared and unorganized mentee</li> <li>• Passive, non-directed mentee</li> <li>• Personality, work styles, gender, ethnicity, other.</li> <li>• Competition from Mentee (surpasses mentor in rank, salary, reputation, productivity, etc)</li> </ul>
<b>Strategies to Improve the Mentor/Mentee Relationship</b>	
<p>Start Early: Discuss mentoring early in study/training/career</p> <p>Identify and foster mentor relationships &amp; networking</p> <ul style="list-style-type: none"> <li>• Provide a list of potential mentors <u>within</u> department/institution</li> <li>• Identify potential mentors <u>outside</u> the department/institution.</li> <li>• Promoting students' longitudinal relationships with clinicians through continuity clinics and research projects<sup>24</sup></li> </ul> <p>Get a commitment</p> <ul style="list-style-type: none"> <li>• Welcome an honest "No, I am unavailable", if a faculty honestly thinks they are too busy to be effective)</li> <li>• Prepare a partnership agreement &amp;/or progress reports (holds mentor and mentee accountable)</li> </ul> <p>Identify and Define long term mentee goals</p> <ul style="list-style-type: none"> <li>• Meet</li> <li>• Regularly</li> <li>• Create a space for interactions outside of the institution (optional)</li> </ul> <p>Develop Faculty (taking into consideration limited time availability)</p> <ul style="list-style-type: none"> <li>• Workshops, brief online courses, written guidelines, etc</li> <li>• Coaching programs in which mentors learn by doing and receiving feedback</li> <li>• A yearly seminar or 1-day workshop for interns to learn about mentorship</li> <li>• Enhance value of mentoring for faculty / Give faculty incentives such as formal evaluations, protected time and awards</li> </ul>	

Structure and some content from text & tables of Sambunjak J. et al. A Systematic Review of Qualitative Research on the Meaning and Characteristics of Mentoring in Academic Medicine. J Gen Intern Med. 2009;25(1):72–8.

Lee JM, Anzai Y, Langlotz CP. Mentoring the Mentors: Aligning Mentor and Mentee Expectations. Acad Radiol 2006; 13:556–561

## Locating a Mentor

There are no real secrets to finding a mentor, other than being aware that it may take time and effort. Given the above impediments to success, junior faculty (or any potential mentee) will sometimes struggle finding and connecting with an available, invested mentor. This will be true in both supportive and less organized institutions, but will likely be easier in organizations with a shared vision of promoting and developing its members. I have always divided all humans into 3 strata, which I think will work when trying to identify mentors. Basically, there individuals who;

- Know what they want (goals/vision/mission)
- Have not formed a definite ideal/path of focus
- Know they don't want certain things

The steps for each of these cohorts merge into one similar process, but the initial recommendations and planning is different. One can also lump those that *Don't Know* with those that *Knows What They Don't Want* together as the process is similar.

Step	Knows what wants	Doesn't Know	Knows what one doesn't want
Step I - Refining goals (Appendix A)	<ul style="list-style-type: none"> <li>• Recommend self reflection, and planning of steps to get to goal</li> </ul>	<ul style="list-style-type: none"> <li>• Recommend self reflection on values, activities, needs to derive personal and professional fulfillment</li> <li>• Reflect on career foci/environments that suits them</li> <li>• Identify 2-4 foci of interest, and lay out steps to expand exposure and knowledge of these areas</li> </ul>	
Step II - Identifying mentors	<p><u>Self Guided</u> (Recommended)</p> <ul style="list-style-type: none"> <li>• Map out all known potential mentors (by name) or by focus, related to your desired aim(s). Consider the planet/orbit (with you as the sun &amp; potential mentors as planets/orbits moons) or grid approach (below).</li> <li>• This will allow you to identify early potential mentors (by name) and gaps (specific foci) to which you want to find mentors</li> </ul> <p><u>Supervisor Guided</u> (Required)</p> <ul style="list-style-type: none"> <li>• Meet with supervisor (or peer) for initial career planning and identification of potential mentors</li> <li>• Use initial supervisor prompted names &amp;/or get refined direction/names from them (&amp; so on)</li> <li>• Reference existing program resources for mentor identification (e.g. lists, vice chairs, Dean's office, etc)</li> </ul>		
Step III – Getting a Commitment	<ul style="list-style-type: none"> <li>• Meet with potential mentors</li> <li>• Assess their interest &amp; availability</li> <li>• Clarify what role they will / might serve (triage; domain; collaborator, etc)</li> <li>• Clarify the goals, and thus success measures of the relationship</li> <li>• Get a formal (below) or informal commitment</li> <li>• Set meeting dates &amp; rules</li> <li>• YOU own and drive the process</li> </ul>		

## Identifying potential and needed mentors in differing domains of development

Domain†	Mentor Options (examples)	Names	Gap/Need
Clinical	Supervisor/Section Chief/Div Head/Dept Chair/Sr. Peer/Chief Res	William Osler John Hunter Josef Skoda	
System Navigation	Peer/Supervisor (need specific)	Macus Welby Patch Adams	
Promotion & Tenure	Division Head/Dept Chair; Sr Faculty Peer; Development Vice Chair, Other Department faculty.	Joseph Lind Thomas Sydenham	
Scholarship	Intake & triage: Supervisor/aligned faculty/scholarship mentors Projects: Mentor experience; Shared interest	Linus Pauling Austin Flint	
Professional Niche	Supervisor, non-Dept/Div supervisor equivalent; Senior peer.	Hawkeye Pierce	NEED
Educator Development	Clerkship, Residency Program faculty; Curriculum developers,	?	NEED
Balance	Peer, supervisors, extra-program senior faculty	?	NEED
Negotiations/Salary	<u>Not your supervisor.</u> Peers, Other Dept/Div/Instit resource	?	NEED

† Ben Hoffman, Dept Pediatrics, OHSU. Professional Development Planning for Faculty Workshop (Doernberchers, Feb 14, 2013). With Permission

# Mentor & Mentee Rules of Engagement & Agreement

In my role as a \_\_\_\_\_ I will;  
(Mentor/Mentee)

Mentor	Mentee
<ul style="list-style-type: none"> <li>Be accessible</li> <li>Establish/Agree to scheduled, routine update and mentor-mentee sessions</li> <li>Work to Identify and define shared goals with my mentee</li> <li>Work to identify the particular domain-scope of our mentor-mentee relationship (Academic, Professional; Personal)</li> <li>Work to guide/implement a successful path to achieve mentee goals</li> <li>Provide expertise, resources and advice</li> <li>Support, develop, and promote the ideas of my mentee</li> <li>Offer constructive critiques to my mentee</li> <li>Develop my mentee towards a path of an independent faculty (Scholar, Educator, Administrator, etc)</li> </ul>	<ul style="list-style-type: none"> <li>Consider the importance of connecting with and establishing relationships with multiple mentors</li> <li>Be accountable for tasks and driving the mentor-mentee process.</li> <li>Scheduled, routine update and mentor-mentee sessions</li> <li>Be organized and come with task-oriented agendas to all meetings</li> <li>Make efforts to articulate and modulate my individual, project, career, and/or program goals with my mentor</li> <li>Accept constructive feedback as well-intended and formative</li> <li>Accept some project/task failure as routine, in the search for a successful project/pathway.</li> </ul>

Our Working Relationship will focus on the below domains (check all that apply):

- |                          |                                  |
|--------------------------|----------------------------------|
| Clinical _____           | Professional Niche _____         |
| System Navigation _____  | Educator Development _____       |
| Promotion & Tenure _____ | Balance (Work-Home; Other) _____ |
| Scholarship _____        | Negotiations/Salary _____        |

The below signatures reflects a commitment to the Mentor-Mentee Process

\_\_\_\_\_  
 John Hancock  
 Mentor Affiliation  
 Date

\_\_\_\_\_  
 Mentee Name, Rank  
 Mentee Affiliation  
 Date

**Opt out:** Due to extenuating circumstances/commitments I am unable to commit to a Mentor-Mentee Relationship at this time

\_\_\_\_\_  
 Mentor Name, Rank  
 Mentor Affiliation  
 Date

\_\_\_\_\_  
 Mentee Name, Rank  
 Mentee Affiliation  
 Date

Appendix A (Long Term Planning)

Pololi L 9 Steps to career planning; <http://careers.bmj.com/careers/advice/view-article.html?id=1446>

Mentee Foundation (have mentee 'complete' prior to-, or as part of their initial self assessment)

1. Who are you? (Identify Core Values)	
2. Prioritize your Core Values	
3. What are your strengths?	
4. 10 Year <i>destination</i> (c/w Values)	
5. Short & Intermediate Goals	
a. One year	
b. Three years	
c. Five years	
6. What tools/skills will you need to achieve above?	
7. Write a learning contract for @ skill/task	<ul style="list-style-type: none"> <li>• (Learning) Objective:</li> <li>• (Anticipated) Completion Date:</li> <li>• Action Steps (iterative)</li> <li>• Resource needs:</li> <li>• Objective/Outcomes Assessment Method (s):</li> <li>• Evidence of effectiveness”</li> </ul>
8. Involve supervisor in plan	
9. Repeat for 1, 3 & 5 year goals	

**Domain Specific Ends-Means Goals**

Domain	(10-year) Goal(s)	Steps/Strategies	Hurdles	Success Measure(s)	Evidence of Effectiveness	Timeline
<b>Administration</b>						

**Vs (Project Specific)**

	Project/Goal:(_____)	Milestones(☺)/Comments
<b>Objectives</b>		
• Short (1-Yr)		
• Intermediate (3-5 yr)		
• Long (~ 10 yr)		
<b>Steps/Strategies</b>		
<b>Logistics</b>		
<b>Impediments</b>		
<b>Success Measure</b>		
<b>Evidence of Effectiveness</b>		

## Appendix B

### PROJECT/DOMAIN PROGRESS REPORT TEMPLATE

(Can be used for short or long-term goals, and can be faculty-centric or program-centric)

Adapted from Ben Hoffman, Dept Pediatrics, OHSU. Professional Development Planning for Faculty Workshop. (With Permission)

\_\_\_\_\_ **Goals for** \_\_\_\_\_ **Date:** \_\_\_\_\_  
 (Domain[s]) (Name)

	Domain	Goals	Success Measure	Timeline
Goal #1)				
Goal #2)				
Goal #3)				
Goal #4)				

#### Objectives to Achieve Above Domain-specific Goals

<b>Goal #1):</b>					
<b>Objective #1):</b>					
<b>Meeting Date</b>	<b>Strategy</b>	<b>Evidence</b>	<b>Timeline</b>	<b>Status</b>	<b>Next Steps</b>
<b>Objective #2):</b>					
<b>Meeting Date</b>	<b>Strategy</b>	<b>Evidence</b>	<b>Timeline</b>	<b>Status</b>	<b>Next Steps</b>
<b>Objective #3):</b>					
<b>Meeting Date</b>	<b>Strategy</b>	<b>Evidence</b>	<b>Timeline</b>	<b>Status</b>	<b>Next Steps</b>

#### Objectives to Achieve Above Domain-specific Goals

<b>Goal #2):</b>					
<b>Objective #1):</b>					
<b>Meeting Date</b>	<b>Strategy</b>	<b>Evidence</b>	<b>Timeline</b>	<b>Status</b>	<b>Next Steps</b>

<b>Objective #2):</b> <input type="text"/>					
<b>Meeting Date</b>	<b>Strategy</b>	<b>Evidence</b>	<b>Timeline</b>	<b>Status</b>	<b>Next Steps</b>
<b>Objective #3):</b> <input type="text"/>					
<b>Meeting Date</b>	<b>Strategy</b>	<b>Evidence</b>	<b>Timeline</b>	<b>Status</b>	<b>Next Steps</b>

**Objectives to Achieve Above Domain-specific Goals**

<b>Goal #3):</b> <input type="text"/>					
<b>Objective #1):</b> <input type="text"/>					
<b>Meeting Date</b>	<b>Strategy</b>	<b>Evidence</b>	<b>Timeline</b>	<b>Status</b>	<b>Next Steps</b>
<b>Objective #2):</b> <input type="text"/>					
<b>Meeting Date</b>	<b>Strategy</b>	<b>Evidence</b>	<b>Timeline</b>	<b>Status</b>	<b>Next Steps</b>
<b>Objective #3):</b> <input type="text"/>					
<b>Meeting Date</b>	<b>Strategy</b>	<b>Evidence</b>	<b>Timeline</b>	<b>Status</b>	<b>Next Steps</b>

# Overall Assessment of the Effectiveness of The Mentor-Mentee Relationship

Beck RA, ..., Yeo TP. Measuring the Effectiveness of Faculty Mentoring Relationships. Acad Med 2005;80:66-71

Recall: The success or failure of this relationship is likely due to the contributions some/all of above factors

## Appendix A

### Mentorship Profile Questionnaire Developed by the Ad Hoc Faculty Mentoring Committee, Johns Hopkins University School of Nursing

Your name: \_\_\_\_\_ Mentor's name: \_\_\_\_\_

#### Part I: Description of Relationship

1. What was the role of your mentor? (e.g., teacher, counselor, advisor, sponsor, advocate, resource)
2. How often did you communicate? (e.g., e-mail, in person, telephone)
3. How long have you had this relationship?
4. How would you characterize the strengths and weaknesses of your relationship?

#### Part II: Outcome Measures

**Directions:** Please check all of the following that resulted from your interaction with your mentor and specify or describe below. Supporting documents may be attached, as appropriate.

1.  Publication:
2.  Presentation or poster:
3.  New teaching method or strategy:
4.  Clinical expertise:
5.  Conducting research:
6.  Service activities (e.g., community service, political activity, professional organization):
7.  Development of a program (e.g., educational/clinical course or new program of study):
8.  Job change/promotion:
9.  Grant writing/submission:
10.  Other:

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## Appendix B

### Mentorship Effectiveness Scale Developed by the Ad Hoc Faculty Mentoring Committee, Johns Hopkins University School of Nursing

Your name: \_\_\_\_\_

**Directions:** The purpose of this scale is to evaluate the mentoring characteristics of \_\_\_\_\_, who has identified you as an individual with whom he/she has had a professional, mentor/mentee relationship. Indicate the extent to which you agree or disagree with each statement listed below. Circle the number that corresponds to your response. Your responses will be kept confidential.

- 0 = Strongly Disagree (SD)
- 1 = Disagree (D)
- 2 = Slightly Disagree (SID)
- 3 = Slightly Agree (SIA)
- 4 = Agree (A)
- 5 = Strongly Agree (SA)
- 6 = Not Applicable (NA)

SAMPLE: My mentor was hilarious.	0	1	2	3	4	5	6
	SD	D	SID	SIA	A	SA	NA
1. My mentor was accessible.	0	1	2	3	4	5	6
2. My mentor demonstrated professional integrity.	0	1	2	3	4	5	6
3. My mentor demonstrated content expertise in my area of need.	0	1	2	3	4	5	6
4. My mentor was approachable.	0	1	2	3	4	5	6
5. My mentor was supportive and encouraging.	0	1	2	3	4	5	6
6. My mentor provided constructive and useful critiques of my work.	0	1	2	3	4	5	6
7. My mentor motivated me to improve my work product.	0	1	2	3	4	5	6
8. My mentor was helpful in providing direction and guidance on professional issues (e.g., networking).	0	1	2	3	4	5	6
9. My mentor answered my questions satisfactorily (e.g., timely response, clear, comprehensive).	0	1	2	3	4	5	6
10. My mentor acknowledged my contributions appropriately (e.g., committee contributions, awards).	0	1	2	3	4	5	6
11. My mentor suggested appropriate resources (e.g., experts, electronic contacts, source materials).	0	1	2	3	4	5	6
12. My mentor challenged me to extend my abilities (e.g., risk taking, try a new professional activity, draft a section of an article).	0	1	2	3	4	5	6

Please make additional comments on the back of this sheet.

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