Structuring the Mentoring Relationship

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A common scenario?

“I think I am supposed to have a mentor...but I don’t know why.”
Perhaps a more common scenario

“I have a mentor, but I don’t know how to move our relationship forward”

“I think I am supposed to have a mentor...but I don’t know why.”
I. The mentoring relationship in broad strokes

II. Mentoring Deliverables

III. Mentorship Outcome
The mentoring relationship goes through four phases

1. **Preparing**: Getting ready. Covered in a separate module “Selecting & Approaching a potential mentor”

2. **Negotiating**: Establishing agreements

3. **Enabling Growth**: Facilitating learning

4. **Coming to Closure**: Looking back, moving forward

Zachary. The Mentoring Guide 2012
Groundwork on structuring the mentoring relationship

SAFE

Confidentiality

Conflicts of Interest

Power Differential

Real or Perceived Competition

SPACE

Burgess et al. The Clinical Teacher 2018
**Approach** to structuring the mentoring relationship

**Take**
- Define career goals & how to get there

**A**
- Think about gaps & how the mentor can bridge them

**Mentee-Centered**
- Articulate these needs

**Define what success looks like**

**Approach**
- Drive the relationship based on needs & definition of success
A successful mentoring relationship requires a *proactive* mentee

<table>
<thead>
<tr>
<th>Ideal mentees are</th>
<th>A proactive mentee steers the process</th>
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<tbody>
<tr>
<td>Proactive</td>
<td>• Are my objectives clear and well defined?</td>
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<tr>
<td>Motivated</td>
<td>• Am I comfortable asking for what I want?</td>
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<tr>
<td>Organized/Persistent</td>
<td>• Am I open to hearing new ideas and perspectives?</td>
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<tr>
<td>Resilient</td>
<td>• Do I allow myself to be open and vulnerable?</td>
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<tr>
<td>Honest</td>
<td>• Am I receptive to constructive feedback?</td>
</tr>
<tr>
<td>Creative</td>
<td>• Am I able to show I value and appreciate feedback?</td>
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<tr>
<td>Receptive</td>
<td>• Am I willing to change or modify my behaviors?</td>
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<tr>
<td>Humble</td>
<td>• Do I consistently follow through on commitments?</td>
</tr>
<tr>
<td>Self-reflective</td>
<td>• Do I make an effort to instill trust?</td>
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<td></td>
<td>• Do I openly show appreciation and gratitude?</td>
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Ludwig S., Stein R. 2008
Sambunkjak, 2009
Regents of the Univ of Ca
Everything works better when things are aligned

Mentor Tasks
- Support
- Challenge
- Establish expectations
- Assess mentees abilities & needs
- Take a work/experience history
- Establish the rules of engagement and what you can provide

Mentee Tasks
- Identify needs
- Identify goals
- Identify interests
- Prepare adequately for meetings
- Reach out to mentor

Ludwig S., Stein R. 2008
Sambunkjak, 2009
Success takes work

Barriers to a Success

- Poor communication
- Lack of commitment
- Personality differences
- Perceived (or real) competition
- Conflicts of interest
- Lack of experience

Articulate & Align
Needs & values: e.g., skills, advancement, personal growth

Communicate early, clearly, explicitly & honestly

Follow through
Work the chemistry
Length of relationship
Agree on boundaries: e.g., prof vs. personal, what is feasible

Zachary & Fischler 2009
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Work the chemistry

Length of relationship

Zachary & Fischler 2009
### Cultivating the Relation in Broad Strokes

<table>
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<th>Task</th>
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<tr>
<td>Agree on the structure &amp; objectives of the relationship</td>
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<tr>
<td>Plan &amp; set meeting agendas</td>
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<tr>
<td>Ask questions</td>
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<tr>
<td>Actively listen</td>
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<td>Follow through on assigned tasks</td>
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<td>Manage up: Be proactive &amp; steer the process</td>
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II. Mentoring Deliverables

• Why are formalized deliverables like a mentoring plan and a meeting agenda a good idea?
  a. Mentoring plan: formal agreement between mentor and mentee.
  b. Mentoring meeting agenda and progress report: tracking goals and monitoring progress

A. Mentoring plan (formal agreement)
• Define “mentee-centered” What does this look like when implemented?
• Sample mentoring plans
• Meeting format, frequency, start to consider deliverables

B. Meeting agenda:
• Goals: Promoting transparency and accountability
• A tool to facilitate negotiation and handle conflict
• Executing deliverables by both parties, with a time frame
• Component parts of a successful agenda
• Why move to concrete metrics and timed plans
Why are formalized deliverables like a mentoring plan and a meeting agenda a good idea?

- Set clear goals (e.g. educational aspects, career development) in writing
- Set clear deliverables (yes, from both parties)
- Establish boundaries (e.g. availability, timeframe for deadlines, authorship expectations)
- Keep parties on task
Formalized deliverables: a good idea?

**Meeting agenda and progress report:** tracking goals and monitoring progress

- Formal agenda (+/- workplan), dated, with discrete objectives by section
- Establish what information should go into the agenda
- Mentee maintenance and responsibility
- Sample agendas and workplans
A. Mentoring Plan: “Mentee Centered”

Mentee centered: “The relationship should be driven more by the needs and interest of the mentee rather than the expectations of the mentor.”

Traditional- unidirectional

Bilateral; mentee centered

Here is what I need.
“All mentoring is not created equal, we discovered. There is a special kind of relationship—called sponsorship—in which the mentor goes beyond giving feedback and advice and uses his or her influence with senior executives to advocate for the mentee.”

“Does having formal versus informal mentoring make any difference in terms of promotions? Yes.”

A. Mentoring Plan - *aligning expectations*

**A. Mentoring plan** (formal agreement).

**Definition:** A signed agreement by both the mentor and mentee designed to *align expectations*.

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**Mentor**

- What is the interest of the mentee?
- What would you like the mentee to get out of the relationship?
- Honestly consider what do you hope to get out of the relationship?

**Mentee**

- What would you like to get out of this relationship?
- What can the mentor help you with?
- Honestly consider what is the interest of the mentor?
A. Mentoring Plan- setting expectations

A. Mentoring plan (formal agreement).

Definition: A signed agreement by both the mentor and mentee designed to align expectations, specifying:

For both:
1. How often will you meet and for how long? In person? Zoom, phone or email?
2. How will this be arranged?
3. What are the meeting and communication ground rules (candor, truthfulness, confidentiality, openness)
4. Do you expect the mentee to bring an “agenda.”

For both:
1. What topics are off limits?
2. What conversations (if any) should be confidential?
3. How will you respect one another’s time?
4. Are you always “on” as mentoring partners (or only when you meet).
5. For both: What are the metrics to close the mentorship?
A. Mentoring Plan

A. Mentoring plan

Be specific (both parties).

- The more specific the answers are the more useful the plan.

For eg “career advice” is far less useful than “navigating the path to tenure on a basic research track between Associate and Full Professor over the next 3-5 years” “learning how to share expertise and gain recognition on a national/international level in the field of ultrasound guided diagnostics.”

- Both parties need to be explicit and honest.

*The mentor needs to say in a perfect outcome “I would like to mentor you to take over 50% of my clinical volume over the coming 3 years as I move to retirement.” or “I would like to help you improve your writing skills by co-writing this review article with me.”*
Mentoring plan

• For both: What topics are off limits? What conversations (if any) should be confidential? How will you respect one another’s time?

• The things I feel are off limits in my mentoring relationship include:

  _____ Disclosing our conversations to others
  _____ Using non-public places for meetings
  _____ Sharing intimate aspects of our lives
  _____ Meeting behind closed doors

• For both: Are you always “on” as mentoring partners (or only when you meet).

• For both: What are the metrics to close the mentorship?
Mentoring Plan vs. Mentoring Agenda

A. Mentoring plan

Sets ground rules
Should establish: how often to meet? who schedules?, a plan if cancelled, and how to make efficient use of the time of the meeting.

• How often will you meet and for how long?
• In person? Zoom, phone or email?
• How will this be arranged?
• What are the meeting and communication ground rules.
• Do you expect the mentee to bring an “agenda.” YES

B. Mentoring agenda:

Helps both parties be accountable and transparent.

• Note taking/accountability is needed. An agenda is a useful took to facilitate this.
• Mentee and mentor should write goals (broad and detailed)
• Establish target dates, review deadlines,
• Consider resources needed (including other mentors/collaborators),
• Assign next steps and to do’s,
• Track progress, add comments
• Calendar deadlines.

Mentoring resource center Wake Forest University
B. Mentoring Agenda: a tool for advocacy

• Not just busy work.
• A roadmap to successful steps, interventions, concrete outcomes, accountability (and credit)
• Areas for advocacy and growth
• A way to make clear what other commitments are being balanced at once.
• Pairs accountability and credit
I. Start with an Introspective view: be realistic about your goals

- Institutional commitments
- Family/Personal commitments
- National and international commitments
- Trainee commitments

Trainee commitments

Institutional commitments

National and international commitments
II. Mentoring Agenda: trainee components

B. Mentoring agenda

• Agenda components and how to structure a strong agenda.
• Sample components are structured around goals and form the “bones” of the mentorship plan.
• In each category consider what goals for growth are needed, and describe these with a time frame.
• Goals can be very concrete (eg take a statistics class) but should be placed in each category or under “general”
B. Mentoring Agenda: trainee components

- Goals vary by career track.
- An early clinical trialist may start with these categories:
  - Clinical trials
    - A. Ongoing
    - B. Planned
  - Scholarship and metrics of productivity: current, goals
  - National and international Meetings: current, goals
  - Teaching: current, goals

• Goals vary by career track.
• An early clinical trialist may start with these categories
B. Mentoring Agenda: elements of a good plan

<table>
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<tr>
<th>Goal</th>
<th>Path to goal</th>
<th>Detailed plan</th>
</tr>
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<tbody>
<tr>
<td>• Articulate needs</td>
<td>• Expertise: Talks, review articles, clinical skills, grants</td>
<td>• Dated, granular enough and transparent enough to follow</td>
</tr>
<tr>
<td>• Articulate outcome</td>
<td>• Project aims 1,2,3</td>
<td>• Highlight areas needing feedback</td>
</tr>
<tr>
<td></td>
<td>• Experiments a-d</td>
<td>• Update weekly, save versions, agree on outcomes</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Articulate obstacles</td>
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Sample detailed agenda available
III. Mentorship Outcome

Goal(s) reached

Mentoring Outcomes

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III. Mentorship Outcome

Mentoring Outcomes

- Goal(s) reached
- Conflicts
III. Mentorship Outcome

Mentoring Outcomes

- Goal(s) reached
- Conflicts
- Longitudinal relationship
Reflecting back on the mentoring outcomes paves the way to future success

- Agree on the structure & objectives of the relationship
- Plan & set meeting agendas
- Ask questions
- Actively listen
- Follow through on assigned tasks
- Ask for feedback
- Manage up: Be proactive & steer the process
Thank You!

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