

Optimizing Your Mentoring Relationship: A Toolkit for Mentors & Mentees

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Section I: Introduction to Mentoring

What is Mentoring?

Definition

Mentorship is “a process by which an experienced, highly regarded, empathic person (the mentor) guides another individual (the mentee) in the development and re-examination of their own ideas, learning and personal and professional development”.

-Royal College of Paediatrics and Child Health (UK)¹

Mentoring Quotes

"The greatest good you can do for another is not just to share your riches but to reveal to him his own."

--Benjamin Disraeli

"If you want one year of prosperity, grow grain,
If you want ten years of prosperity, grow trees,
If you want one hundred years of prosperity, grow people."

-- Chinese proverb

Mentor Roles and Actions—The 5 “C”s

Mentor Role	What a Good Mentor Does
Career Development	<ul style="list-style-type: none">• Introduces the mentee to others—networking• Clarifies goals• Identifies and suggests opportunities• Encourages development of a focus• Facilitates decision making
Champion/Sponsor	<ul style="list-style-type: none">• Nominates for awards or organizational offices• Shares credit• Celebrates successes
Coach	<ul style="list-style-type: none">• Encourages and supports• Motivates• Role models• Promotes independence
Confidant	<ul style="list-style-type: none">• Listens• Maintains confidential discussions
Counselor	<ul style="list-style-type: none">• Advises• Encourages work-life balance

Potential Benefits of Mentoring

Mentee Benefits	Mentor Benefits
Personal Growth and Development	Personal Growth and Development as a Teacher-Mentor
Networking	Developing a Personal Network
Enhance Productivity	Enhance Productivity (Mentors who work with mentees on scholarly projects may enhance their own productivity)
Career Advancement and Promotion	Promotion (Mentoring counts toward criteria for promotion in most academic centers)
Career Satisfaction	Career Satisfaction

Adapted from Detsky AS, et al,² Ludwig S & Stein R³

Mentees—How to Succeed

Mentees are most successful when they are open to new opportunities, are focused, collaborative, motivated, invested and accountable. Below are tips to optimize your success as a mentee.

10 Tips to be a Successful Mentee

1. Drive the relationship (“Mentee- Driven” Mentoring Relationships). Know what you want from the mentor-mentee relationship. Tell your mentor how he/she can be helpful to you.
2. Define your goals.
3. Invest enough time in the relationship. Make your mentor meeting a priority.
4. Develop an agenda (or list of questions) for each mentor meeting.
5. Be open to another viewpoint, to learn new skills, or to suggestions.
6. Ask your mentor for feedback periodically.
7. Reflect on feedback your mentor gives you. What are you doing well? In what ways can you improve? Develop an improvement plan.
8. Take advantage of opportunities your mentor offers you if it fits your career goals. For example, taking on a volunteer role in an organization may lead to national recognition.
9. Even introverts need to network. Go to a meeting with your mentor and ask your mentor to introduce you to people that you might want to collaborate with or who have similar interests.
10. Tell your mentor how much the relationship has helped you or how much you appreciate the advice that has been given. Regularly update your mentor on your successes and explain how your mentor’s work contributed.

Adapted from Ludwig S, Stein R³ & Zerzan JT, et al.⁴

Identifying Mentoring Needs: Mentoring Mosaic Activity

Background:

While the appropriate utilization of mentors is an important aspect of career success, some mentees have difficulty identifying who their mentors are. This activity allows participants the opportunity to reflect broadly on their network (mosaic) of mentors and identify areas for mentoring needs.

Guidelines for use:

Participants should spend 10-15 minutes individually completing the “Mentoring Mosaic” worksheet on page 6, then spend an additional 10-15 minutes discussing strategies to recruit additional mentors with peers or with a senior mentor. Each box represents a domain in which someone might need mentorship. The four white boxes are pre-populated with domains that are universal to all physicians. These include Primary Mentors, Work-Life Mentors, Professional Development Mentors, and Future Mentors. The remaining orange boxes are intentionally left blank so that participants can enter mentoring domains specific to their needs. For example, a participant might have mentoring needs in the fields of “Educational Technology” and “Residency Program Management” whereas another participant might have mentoring needs in the fields of “Qualitative Research” and “Time Management”.

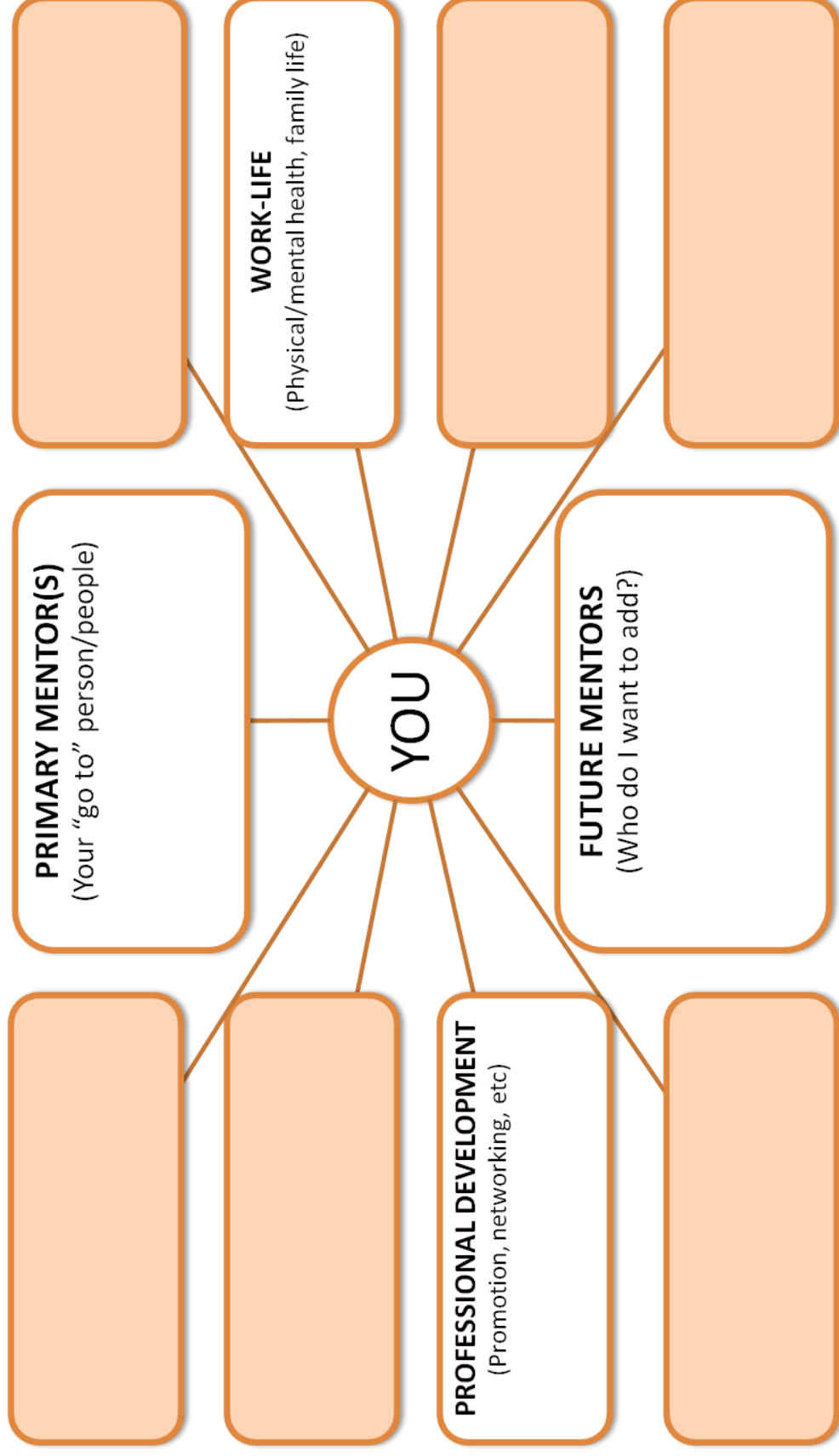
Participants are encouraged to think broadly about the mentorship they engage in. Mentors can be one’s junior, peer, or senior. Mentors can also be internal to one’s institution or external (either regional or national). Lastly, not all mentors need to come from the field of medicine. An outside perspective can be invaluable to a mentee.⁵

If a participant notices that a single mentor shows up in all of their domains it would be best to strategize ways to rely less on the same person (relying on the same person for all of your professional needs puts the mentor at risk for mentor fatigue). Further, relying too much on a single mentor carries some professional risk because if that mentor leaves their institution it can result in a serious mentoring deficit.

Some participants might have difficulty identifying mentors or domains in which they need mentorship. Below is a list of areas where participants might have mentoring needs. In these areas they should think to themselves, “If I needed assistance in this area, to whom would I go to for advice?”

- Research skills (manuscript preparation, poster preparation, developing research questions, grant writing and management)
- Information technology/Computer literacy (Data collection and management, Microsoft suite, etc.)
- Clinical and procedural skills
- Professionalism, communication and interpersonal skills
- Curriculum development
- Medical education (e.g. residency program management)

Mentoring Mosaic



1. Place the initials of your mentors in the box that describes how they mentor you. The same person can be used multiple times.
2. After each set of initials, add a dash (-) and indicate whether they are senior (S), peer (P), or junior (J).

Section II: Mentoring Models

A variety of different mentoring methods exist. Some require a high degree of commitment over time, while others may optimize the expertise of a limited number of mentors in a brief timeframe. The methods below can be employed to fit the mentoring needs of faculty, based on the needs of mentees and the capacity of mentors.

Dyadic (One on One) Mentoring Guidelines

Background

These guidelines provide you with some specific suggestions and practical ideas for your traditional dyadic, one on one mentoring. In this model, a mentor is paired with a mentee for general career and professional development advice, or specific project or programmatic mentorship. Traditional dyadic mentoring can be a rewarding experience, but requires a commitment from both mentor and mentee to enter into an ongoing relationship. Dyadic mentoring happens commonly within institutions and can be a tool in professional organizations to grow the skills of the junior membership. The instructions below are intended to provide structure to an initial meeting with your mentee and guidance for follow-up meetings or calls. (Session time: 90 minutes)

I. Timeline Guide for Mentoring Session (Initial Session)

1. Introductions – 15-minutes

- Establish relationships--Take time to establish relationships at the onset of the session. Each of you should summarize your personal history. Discuss the individual's professional goals. Discuss the challenges, interests, or themes the individual might be facing.
- Set ground rules for future interaction/mentoring sessions --Establish the rules, such as no multi-tasking (texting, email). Determine the frequency of subsequent meetings/conference calls. Agree on conduct, such as confidentiality, no idea is a bad idea (no challenging or contradicting during brainstorming, as an example).

2. CV Activity—Learn more about each other- Total time 25 minutes

- Exchange CVs- each individual should take about 5 minutes to review the other person's CV
- Discuss commonalities, common interests or themes
- Focus on the mentee's CV—discuss your impression of the following
 - i. The mentee's area of focus (perceived area of focus or lack of focus)--ask the mentee what he/she considers an area of focus; discuss ways to develop focus or to adjust the CV to better reflect or document the area of focus
 - ii. Service—involvement in committees or organization work. Discuss the advantages and disadvantages of involvement in these areas. How do you decide which committees or organizations to become involved with?
 - iii. Scholarship—Discuss the importance of scholarship to an academic career. Discuss scholarship goals and ask the mentee to think of a scholarship goal.
 - iv. Previous mentoring experiences—has the mentor had a mentor previously. If so, in what capacity? Was it successful—why or why not; if not, what can be done differently in this relationship to make it successful?
 - v. Documentation/capturing of experiences—discuss importance of keeping the CV up to date (not losing experiences);
 - vi. Other—there may be other areas that naturally emerge depending on the individual.

3. **Establish the goals of the mentor/mentee relationship as it relates to what you have learned about the individual– 10 minutes**
Use brainstorming* to identify potential goals. Determine 2-3 major goals for the individual.
4. **Discuss project/ideas and the outcomes desired – 25 minutes**
Facilitate discussion about projects or scholarship opportunities the individual might pursue. Discuss measurable outcomes from projects. Mentors and mentees might collaborate on a project. This discussion should be continued at the first call.
5. **Establish date and time of your first mentor/mentee follow up meeting/call -5 min** (or assign the mentee to contact you with some proposed dates/times during the week after the meeting).
6. **(Optional if time left over—otherwise, this may be deferred to the first mentor/mentee call). Determine a timeline of activities based on a project/scholarship opportunity – 15 minutes**
 - Make a timeline based on goals and outcomes desired. Work around timelines externally imposed (e.g. submission dates for abstract). Determine the frequency of the conference calls you want to establish (generally monthly, but additional calls may be needed leading up to important milestones) and best times.

II. Guidelines for Effective Mentor/Mentee Meetings/Conference Calls

1. **Set an agenda with sufficient lead time**
Give each meeting/call a title or subject area to be covered. Establish the goals of the meeting/call and the actions items to be addressed. Make pre-meeting/call preparation clear (examples): Homework, background reading or drafts of abstracts.
2. **Communicate times and dates clearly**
Remember time zones and clearly identify times. Always indicate the next conference call/meeting date and time.
3. **Talk about conference call etiquette/management.**
Use the mute button when there is background noise or when typing. If background noise exists (airports on cell phones, other phone calls, knocks on the door, pages, etc.), address it directly--Ask the individual to try another means of calling in if needed.
4. **Summarize at transition points in the agenda**
Use these summaries to obtain consensus as a read-back means of obtaining feedback.
5. **Ending the meeting/call.**
Summarize major decisions, assignments, and action steps.

III. Other Considerations for the Mentoring Process

1. If working on a project together, discuss authorship on any abstracts, manuscripts, workshops, early on.
2. Provide and review timelines and deadlines often. Offer interim updates between scheduled meetings.
3. Establish a means of receiving feedback for your role as a mentor (this can be as easy as making a prospective plan that in 6 months you will both discuss the relationship-- what has worked and what has not—plans for modifications)

* Brainstorming is defined as “an idea that someone thinks of suddenly” and in this context, it is in group discussion to generate as many ideas as possible, a common technique used in group discussion. Ref: <http://www.merriam-webster.com/dictionary/brainstorm>. Accessed July 31, 2016

Facilitated Peer Group Mentoring Guidelines

Background

Facilitated Peer Mentoring employs the shared expertise of peer colleagues, under the guidance of a more experienced faculty facilitator. Whereas in traditional dyadic mentoring, mentors are generally at a different personal or professional stage from their mentee, facilitated peer mentoring optimizes the benefits of sharing experiences with colleagues at a similar professional stage. Peer mentoring can be a useful tool in groups with a larger number of junior faculty and fewer senior mentors (I.e. women in academic medicine, underrepresented minorities in medicine). These guidelines provide specific suggestions and practical ideas for mentor facilitation of peer groups. We offer a suggested agenda for the initial session. (Session time: 90 minutes)

Agenda of Peer Group Mentoring Session

- 1. Introductions** 15-20 minutes
 - Establish relationships: Take time to establish relationships at the onset of the session. Have each member of the group share their own personal stories and professional goals. Discuss the challenges, interests, or themes that they are facing.
 - Do an introductory activity to facilitate teamwork and relationship building (optional). For example, have each member of the group share a favorite hobby or sports team loyalty.
 - Set ground rules for engagement and conduct during group activities:
 - All members should actively engage in discussion and discussions are confidential
 - This is an environment of respect—participants should avoid checking text, email, etc. and should respect other’s opinions. There should not be challenges or contradictions during idea sharing so that all ideas are expressed.
- 2. Establish the goals of the group** 10 minutes

Share ideas to identify potential goals. Use a nominal group process to determine 2-3 major goals [This can be accomplished by giving each group member 6 votes and allow them to cast their votes for any combination of goals listed on the flip chart – that means that a group member could cast all six votes on one topic or one for each of 6 topics.]
- 3. Discuss project/ideas and the outcomes desired** 45 minutes

Facilitate a discussion about a group project and using a nominal group process to determine the group’s project. Discuss the measurable outcomes that may emerge from the project.
- 4. Assign roles of the group** 5 minutes

Roles will depend on the project and there will be a natural selection process that takes place within the group. Certain roles will be assigned as the project evolves. Two important roles that should be determined early are the Group Leader(s) and the Communications Director. The Group Leader/Coordinator organizes the project, leads conference calls, and may assign tasks. The Communications Director takes minutes, circulates reports, and schedules conference calls. The Facilitator will provide coaching so that group members will fulfill these roles. Other roles depend on the work to be done to achieve the goals of the project such as doing literature searches, drafting a manuscript, applying for a grant, designing a curriculum and evaluation tools, or evaluating the project. Mentees should indicate their interests in fulfilling certain roles.
- 5. Determine the timeline of activities based on the project** 15 minutes

Work around timelines externally imposed (submission dates for abstracts, timing of a meeting, etc.). Determine the frequency of conference calls (generally monthly, but there may be additional calls needed leading up to important milestones along the way) and best times.
- 6. Establish date and time of first call and discuss call frequency.**

This is a key step and must be accomplished before the group adjourns.

Meet the Professor Mentoring Guidelines

Background

Meet the Professor Mentoring allows a smaller cohort of mentors to address the needs of a larger group of mentees. Mentors and Mentees meet for a focused period of time with no expectation for ongoing mentoring or follow up. Mentees may seek mentorship on specific aspects of their career or on particular components of a project. These guidelines provide you with some specific suggestions and practical ideas for organizing, facilitating, and participating in a Meet the Professor mentoring session. (Session time: 60 minutes)

Overview

This format allows for a limited number of mentors to meet with a larger number of mentees. It is a useful format when the number of participants may be difficult to predict in advance, or at sessions with a large number of junior mentees. No advanced preparation is required by mentors or mentees, and there is no expectation for ongoing mentorship after the session. During the session, one to two mentors are seated at a table with 6-8 mentees, based on topic of interest. After brief introductions, mentees are invited to ask questions of the mentor in an informal fashion. Mentors are provided with questions intended to trigger discussion, should the table need direction (see Appendix B).

I. Facilitator Preparation for Mentoring Session

- 1. Identify and Invite Mentors:** Set clear expectations for what to expect. Facilitate a round-table discussion during the session. No preparation or follow up mentorship required.
- 2. Mentee Registration:** This session lends itself well to sessions in which late registration of mentees may occur as no advanced preparation is required. Mentees should identify their area of focus
- 3. Determine Table Topics:** Table topics may be assigned to meet the needs of mentees. They may focus on a clinical or scholarly area of interest.

II. Facilitating Mentoring Session

- 1. Session Outline:** Minimum time 1 hour. Tables of 1-2 mentors & 6-8 mentees. Be mindful of physical space of room-ideally round tables spaced far enough apart so that adjacent tables do not disrupt one another's conversation. Tent cards on tables can be helpful to identify mentor names as well as table topic assignments
 - a. Facilitator introduces session, reminder of expectations
 - b. Open discussion at tables. Sample format:
 1. Introduce yourself (name, role, institution, and your background/expertise in your table topic)
 2. Mentees introduce themselves by name, role, institution, and what they hope to get from the session.
 3. Open discussion by inviting folks to ask any questions. Alternatively, begin discussion on topic raised by mentee during introduction.
 4. Encourage all mentees to participate or provide feedback on each other's questions/ideas.
 5. Recommend APPD and other resources to support mentee's needs. Take this as an opportunity to direct them to APPD resources. Resources include Taskforces, APD and FPD Executive Committees, LEAD, Regional Chairs, LEARN, etc.
 6. Encourage participants to share contact information with each other for long-term (post meeting) peer support.

III. Guidance for Participants

1. Facilitators-advance preparation, flexibility with shifting volumes of mentors/mentees
 2. Mentors-no advanced preparation needed
 3. Mentees-no advanced preparation required, though considering questions to ask mentors is beneficial.
- Questions may be project specific, or may focus on a particular aspect of a mentee's professional development

Speed Mentoring Guidelines

Background

Speed mentoring allows groups of mentors and mentees to meet for a focused period of time with no expectation for ongoing mentoring follow up. Mentees may seek mentorship on specific aspects of their career or on particular components of a project. These guidelines provide you with some specific suggestions and practical ideas for organizing, facilitating, and participating in a speed mentoring session. (Session time: 90 minutes)

Overview

The format is modeled off the highly successful APA/PAS speed mentoring sessions in which mentors and mentees share each other's CVs for review in advance and mentees come prepared with questions. During the session, participants are grouped in tables of five mentors and five mentees, based on topic of interest. Each mentee spends ten minutes with each of the five mentors at their table for one-on-one interactions. In order to make the most of the speed mentoring experience, mentors and mentees review one another's CVs in advance and mentees are expected to bring specific questions for mentors to the session.

I. Facilitator Preparation for Mentoring Session

1. **Identify and Invite Mentors:** Set clear expectations for what to expect. Review CVs in advance, time commitment during session, no follow up mentorship required.
2. **Mentee Registration:** clear expectations of who is to be included, advance preparation required, no follow up expected. Sample questions to assist with mentor/mentee table pairings:
 - a. Your role (Program Director, Associate Program Director, Fellowship Director, Associate Fellowship Director):
 - b. Years in your current role:
 - c. Area of educational/scholarly interest:
 - d. What are your speed mentoring needs (examples: career advice, advice about a program problem, question about scholarship, etc)?
 - e. What are you hoping to gain from this session? Be as specific as possible (examples: I'd like to develop a strategy for academic promotion, I'd like to learn more about how to publish my curriculum, etc)
3. **Mentor/Mentee Pairings:** Best identify mentorship needs with skills set of mentors
4. **Distribute Mentor & Mentee CVs:** ideally 1 week in advance of meeting to allow for adequate time for review

II. Facilitating Speed Mentoring Session

1. **Session Outline:** Minimum time 1.5 hours. Tables of 5 mentors & 5 mentees. Be mindful of physical space of room-ideally tables narrow to allow for close conversation, particularly if a large group.
 - a. Introduce session, reminder of expectations
 - b. Mentor/mentee rotations: 10 minutes each, keep time, rotate after 10 mins
 - c. Wrap up-5 mins

III. Guidance for Participants

1. Facilitators-advance preparation, flexibility with shifting volumes of mentors/mentees
 2. Mentors-no advanced preparation needed
 3. Mentees-no advanced preparation required, though considering questions to ask mentors is beneficial.
- Questions may be project specific, or may focus on a particular aspect of a mentee’s professional development

Summary of Mentoring Options

When mentoring is done at an organizational level (i.e. within a professional society or within a department), decisions need to be made regarding the type of mentoring needed, how many people need mentoring, what can be logistically implemented, and what is sustainable. Many organizations initially choose to institute the traditional dyadic mentoring model. However, if the organization is large, has many people in need of mentoring, and/or has a limited number of mentors, sole use of the dyadic model may result in mentor fatigue. This was seen in the Association of Pediatric Program Directors about 3 years after the dyadic mentoring model was implemented. We experienced difficulty in recruiting adequate numbers of mentors and had to limit the number of mentees that could be matched with a mentor. This catalyzed the investigation and discussion of other mentoring models such as facilitated peer mentoring, meet the professor sessions, and speed mentoring. Incorporating models other than dyadic mentoring may result in provision of mentoring services to more people and decrease mentor fatigue. Each organization needs to evaluate their own needs and determine which model(s) are aligned with their own goals. However, for large organizations with significant numbers of mentees, considering incorporation of a variety of mentoring activities may be beneficial.

Mentoring Models and Relative Benefits

Mentoring Format	Time Commitment for Mentor	Time Commitment for Mentees	Longitudinal Commitment from Mentor and Mentee	Usefulness for <u>long term</u> career, project, or personal development mentoring	Usefulness for providing expert guidance on specific problems
Dyadic Mentoring	++++	++++	++++	++++	++
Facilitated Peer Group Mentoring	++	++++	++++	++++	++
Meet the Professor Sessions	+	+	None	+	+++
Speed Mentoring Session	+	+	None	+	++++

Section III: Tools to Facilitate Mentoring Experiences

Introduction: Maintaining an accurate CV, developing career goals for mentorship, personal reflection and bi-directional feedback are all tools to optimize mentoring relationships and mentoring programs. Below are tools to assist mentors and mentees in achieving these aims.

Preparation and Maintenance of a Curriculum Vitae

Importance

The curriculum vitae (CV), letters from referees, and samples of scholarly work provide the evidence used during the evaluation processes for appointments and promotions within academic institutions. Complete and accurate reporting of accomplishments and achievements is essential. Keep in mind the CV documents accomplishments, not intentions. Mentors should give these guidelines to mentees and use CV preparation as an opportunity to drive a conversation on professional development planning, as well as providing feedback on the CV itself.

General Guidelines

- Chronology of events: list from earliest to most recent
- Definitions of local, regional, national, and international – seek guidance from your institutional Appointments and Promotions Committee
- Report each activity, role, or achievement only once
- Avoid abbreviations or acronyms (your CV will be reviewed by individuals outside your field)
- Paginate for ease of reference
- Use the format suggested by your institution – be meticulous and follow instructions
- Update your CV every 2-3 months and note the date of preparation
 - Create a process to update your CV using a paper or an electronic file system to capture details
- Number references in each entry in the Report of Scholarship and indicate, with footnotes, co-first authorship
- Use bold-faced type for your name in the authorship list

Example of an Outline of Curriculum Vitae (Harvard Medical School Format)

You must follow your institutional guidelines meticulously

Personal Information

Date Prepared:

Name:

Office Address:

Home Address:

Work Phone:

Work E-Mail:

Work FAX:

Place of Birth:

Education

Postdoctoral Training

Faculty Academic Appointments

Appointments at Hospitals/Affiliated Institutions

Other Professional Positions

Major Administrative Leadership Positions*

Committee Service*

Professional Societies
Grant Review Activities
Editorial Activities
Honors and Prizes

**Group into categories – Local, Regional, National, International*

Report of Funded and Unfunded Projects

Funding Information (group into Past and Current)
Current Unfunded Projects

Report of Local Teaching and Training

Teaching of Students in Courses
Formal Teaching of Residents, Clinical Fellows, and Research Fellows
Clinical Supervisory and Training Responsibilities
Laboratory and Other Research Supervisory and Training Responsibilities
Formally Supervised Trainees and Faculty
Formal Teaching of Peers (e.g., CME and other continuing education courses)
Local Invited Presentations

Report of Regional, National, and International Invited Teaching and Presentations

Report of Clinical Activities and Innovations

Current Licensure and Certification
Practice Activities
Clinical Innovations

Report of Technological and Other Scientific Innovations

Report of Education of Patients and Service to the Community

Activities
Educational Materials for Patients and the Lay Community
Recognition

Report of Scholarship

Peer-Reviewed Publications in print or other media
Non-Peer Reviewed Scientific or Medical Publications/materials in print or other media
Professional Educational Materials or Reports in print or other media
Clinical Guidelines and Reports
Thesis
Abstracts, Poster Presentations, and Exhibits Presented at Professional Meetings (past three years)*
**Length of time varies by institutions.*

Narrative Report*

Opening Paragraph
Area of Excellence
Teaching and Education
Significant Supporting Activities

**Some institutions include a personal statement in addition to the CV and do not include a Narrative Report within the CV. Do not exceed the recommended word limit.*

Professional Development Plan

Introduction

The APPD Professional Development Plan is a tool used to guide personal reflection from the mentee in order to further inform their professional development needs. This tool allows mentees to reflect on their mission, vision and values and guides goal setting. To allow optimal time for personal reflection, the Professional Development Plan should be given to the mentee in advance of a mentorship meeting. It can be used to guide the meeting, as well as provide accountability and follow-up on goals and action items that stem from the encounter. (Adapted, with permission, from Spector N, Sectish T. Professional Development Planning for Academic Faculty. Further details regarding the process of professional development planning can be found on MedEdPORTAL. Available from: <https://www.mededportal.org/publication/9280>)

Professional Development Plan

Name

Professional Role(s)

Mission, Vision, Values

Use this space to describe your personal mission, vision, and values as they pertain to your professional role. Mission is why you exist. Vision is where you want to be. Values are what are important to you.

Self-Assessment

Use this space to list your strengths and challenges in your professional role.

Professional Goal

Please write three goals that you have for the upcoming academic year.

Goals are lofty and broad, may be short term or long term and should be faculty centered.

Goal 1:

Professional Objectives

Please write two objectives for each goal that you will work to achieve during the upcoming academic year. For each objective, list the educational strategies to achieve the objective, describe the evidence that proves the objective has been met, and detail the timeline to accomplish the objective.

Objective 1:

Strategies:

Evidence:

Timeline:

Objective 2:		
Strategies:	Evidence:	Timeline:

Professional Goal

Goal 2:

Professional Objectives

Objective 1:		
Strategies:	Evidence:	Timeline:

Objective 2:		
Strategies:	Evidence:	Timeline:

Professional Goal

Goal 3:

Professional Objectives

Objective 1:		
Strategies:	Evidence:	Timeline:

Objective 2:		
Strategies:	Evidence:	Timeline:

Mentor Comments

Please have your mentor make specific comments about your Professional Development Plan

Mentor Signature

Reflective Audit of Your Mentoring Relationship

Mentor Reflection

Introduction: Regular bi-directional feedback is important to the success of a dyadic mentoring relationship. The “Reflective Audit of Your Mentoring Relationship” tools for both Mentors and Mentees may be used to guide this feedback when used periodically to reflect on the strengths and weaknesses of a mentoring relationship and help guide areas for improvement. The Mentor tool prompts self-assessment of the professional environment, the needs of the mentor and mentee, and of the relationship itself. The tools should be completed by the mentor and the mentee prior to a meeting and should be reviewed together in order to celebrate the strengths, and consider improvements for the relationship.

Respond to statements below by indicating how much you agree or disagree with the statement.

Professional Environment	Strongly Disagree	Disagree	Neutral	Agree	Strongly Agree
I work in an environment that supports my work as a mentor					
I have been provided with training to support my work as a mentor					
I have sufficient time to pursue my goals as a Mentor					
I have access to sufficient resources to help me achieve my goals as a mentor					
I have the support from the leadership within my department to assist me in achieving my mentoring goals					
Comments:					
My Mentee	Strongly Disagree	Disagree	Neutral	Agree	Strongly Agree
I am aware of my mentee’s core values (or my peer group mentees’ shared core values).					
My mentee’s core values (or my peer group mentees’ shared core values) and my core values are in alignment					
My mentee (or peer group) is available to meet frequently enough to achieve their professional goals					
I have the skills and expertise that is needed by my mentee or peer group to achieve her/his (their) professional goals					
My mentee (or peer group) inspires me to work to help her/him (them) to reach their professional goals					

Comments:					
Myself	Strongly Disagree	Disagree	Neutral	Agree	Strongly Agree
I am conscious of my core values and use them to help me establish my professional goals and activities					
I am organized and persistent					
I am take the time to step back, be self-reflective, and do self-assessment regularly					
I invite feedback from my mentee (or peer group) to make improvements					
I have acquired new skills to help me achieve my goals as a mentor					
Comments:					
Mentoring Relationship (refers to the relationship you have with an individual or with a peer group)	Strongly Disagree	Disagree	Neutral	Agree	Strongly Agree
The relationship was enhanced by our ability to establish a working relationship early in the process					
The relationship was enhanced by the valuable expertise I brought to the relationship to assist my mentee					
The relationship has facilitated my mentee's successful completion of activities and projects					
My commitment of time and energy has been matched by the commitment of time and energy of my mentee					
Our mentoring relationship has been an important element in assisting my mentee advance his/her professional goals					

Strengths of my mentoring relationship:					
Areas to improve in my mentoring relationship:					

Reflective Audit of Your Mentoring Relationship

Mentee Reflection

Introduction: Regular bi-directional feedback is important to the success of a dyadic mentoring relationship. The “Reflective Audit of Your Mentoring Relationship” tools for both Mentors and Mentees may be used to guide this feedback when used periodically to reflect on the strengths and weaknesses of a mentoring relationship and help guide areas for improvement. The Mentee tool prompts self-assessment of the professional environment, the needs of the mentor and mentee, and of the relationship itself. The tools should be completed by the mentor and the mentee prior to a meeting and should be reviewed together in order to celebrate the strengths, and consider improvements for the relationship.

Respond to statements below by indicating how much you agree or disagree with the statement.

Professional Environment	Strongly Disagree	Disagree	Neutral	Agree	Strongly Agree
I work in an environment that supports my professional development					
I have been provided with training to support my professional development					
I have sufficient time to pursue my professional Goals					
I have access to sufficient resources to help me achieve my professional goals					
I have the support from the leadership within my department to assist me in achieving my Goals					
Comments:					
My Mentor	Strongly Disagree	Disagree	Neutral	Agree	Strongly Agree
I am aware of my mentor’s core values (or my peer group’s shared core values).					
My mentor’s core values (or my peer group’s shared core values) and my core values are in alignment					
My mentor (or peer group) is available to meet frequently enough to achieve my professional goals					
My mentor (or peer group) provides me with skills and expertise that contribute to my work					
My mentor (or peer group) inspires me to work towards my professional goals					

Comments:					
Myself	Strongly Disagree	Disagree	Neutral	Agree	Strongly Agree
I am conscious of my core values and use them to help me establish my professional goals and activities					
I am organized and persistent					
I am take the time to step back, be self-reflective, and do self-assessment regularly					
I invite feedback from my mentor (or peer group) to make improvements					
I have acquired new skills to help me achieve my professional goals					
Comments:					

Mentoring Relationship	Strongly Disagree	Disagree	Neutral	Agree	Strongly Agree
My mentoring relationship has been an important element in assisting me achieve my professional goals					
Strengths of my mentoring relationship:					
Areas to improve in my mentoring relationship:					

Delivering Feedback to Optimize the Mentor-Mentee Relationship

Feedback is specific information about observed performance, given with the intent to improve performance by modifying the action of participants^{6,7}. Feedback is an important part of optimizing the mentor-mentee relationship.⁵ The mentee needs feedback on strengths, areas for growth or development, and progress toward goals.^{2,8,9} The mentor needs feedback on communication frequency, communication style, and how well the mentor is meeting the needs of the mentee.⁴

The Ask-Tell-Ask Feedback Model

Various feedback models exist to structure an optimal feedback session. The Ask-Tell-Ask model was first described in 2001 as a method for communicating with families and has since been adapted as a feedback model^{10,11}. This model consists of three steps:

1. **Ask** the mentee for their self-assessment. Advance completion of the previous reflective audits may be used to promote this self-reflection.
2. **Tell** the mentee your concerns and observations. Provide feedback on what is going well. Address one or two areas of improvement. These observations should be:
 - a) **Descriptive** (not judgmental or evaluative) –Describe “what” was said or done and not “why” you think it was done.
 - b) **Specific** -- The feedback provides a specific example of the behavior you are describing
 - c) **Timely** --Feedback should be given as close to the observed event as possible.
 - d) **Well-timed**—Feedback should be done when both the person giving feedback and the recipient are not rushed for time, distracted, or emotional.
 - e) **Limited**—Resist the inclination to provide a list of feedback points. Limit the feedback to 2-3 points. Too much feedback can overwhelm the recipient and therefore none of it may be incorporated.
 - f) **Compassionate** – Delivering constructive feedback should be done compassionately. Feedback that is delivered in an insensitive way is likely to be disregarded.
 - g) **Balanced** -- Feedback should describe the things the individual excels at, as well as those that could be improved. If you are the mentor or mentee to an exceptionally enthusiastic, competent, and focused person who is highly productive, most of your feedback should be positive. To only provide constructive feedback to a person who is clearly excelling negates all of their successes.
3. **Ask** the mentee their understanding. Discuss a plan for improvement with the relationship moving forward.

Adapted from Turner, et al⁶, Barnett¹⁰ and French et al¹¹

Section IV: References and Additional Mentoring Resources

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Note: To optimize mentorship program success, facilitators should be familiar with the content of the starred references above and resources below

Additional Mentoring Resources

Below is a list of mentoring resources to further inform your mentoring program.

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