

# Making the Most of Your Mentor: A Guide For Mentees

Surviving and Thriving in the Research Years  
Seattle, WA  
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# Agenda

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- Introduction to mentoring
- Stages of mentoring
- Special situations
- Cases and discussion

From the mentee's perspective!

*Originally presented at Society of General Internal Medicine 2006 and 2007  
Judy Zerzan, MD, MPH, University of Colorado*

# **Introduction to Mentoring**

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# Defining the Mentor Relationship

Dynamic

Collaborative

Mentoring:  
Advancement  
and enjoyment  
of career

Professional  
Development

Two Way  
Street

Personal  
Development

# A Mentor is different than a...

- ◉ Manager
  - Directs work
  - Focus on performance
  - Motivated by organizational needs
- ◉ Role Model
  - A distant relationship
  - Passive role
- ◉ Sponsor
  - Champions
  - Focus on career development
  - Motivated by advancement goals

# Good mentorship can...

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- Increase productivity
- Improve career advancement
- Increase achievement of grant funding



# Roles

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## Mentor

- ◉ Advanced rank/experience who guides, teaches, develops novice
- ◉ Skill development
- ◉ Academic guidance
- ◉ Research
- ◉ Personal development

## Mentee

- ◉ Active role: plan and set agenda
- ◉ Follow through
- ◉ Ask questions
- ◉ Ask for feedback
- ◉ Listen
- ◉ Managing up

# Desired Qualities

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## Mentor

- ◉ Available and accessible
- ◉ Coach & role model
- ◉ Recognize potential
- ◉ Provide opportunities
- ◉ Inspire to take risks
- ◉ Improve
  - Sense of identity
  - Competence
  - Effectiveness



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## Mentee

- ◉ Well organized and takes initiative
- ◉ Creativity and motivation
- ◉ Open to new ideas
- ◉ Seeks feedback
- ◉ Respectful and considerate
- ◉ Know resources
  - especially other people

# Stages of Mentoring

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# Stages of Mentoring

*Kathy Kram*

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**Initiation**

Initially hierarchical

**Cultivation**

Interactive sharing

**Separation**

Plan to independence

**Redefinition**

Collegial relationship

# Stages of Mentoring

*Kathy Kram*

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Initiation

Positive emotions

Cultivation

Relationship reality

Separation

Negative emotions & stress

Redefinition

Gratitude

# Initiation: First Steps

## Clarify *Values*

- What do you value?
- Interpersonal preferences?
  - Personality
  - Gender
  - Race
- Mentor style?
  - Hands on vs. gentle guidance

## Clarify *Needs*

- Knowledge gap
- Skills gap
- Confidence level
- Opportunities
- What do you want mentor for?
  - Professional
  - Personal
  - Research
  - Academic
  - Skill development

## Set A *Clear Vision*

- Write down goals
  - Three months
  - One year
  - Three years
- Be specific
- Even if you don't know – try!

# Securing A Mentor...or two!

## Where to Look



- Target those you know & respect
- Look w/in your department & outside
- Conduct informational interviews
- Ask for recommendations

## Common Difficulties



- Perceived unavailability
- Fear of rejection
- Career indecision
- Trying to find “all-in-one” mentor

## What to Do



- Be persistent and don't give up
- If uncertain, seek someone to guide
- Find more than one
- Find junior and senior mentors

# Tips for the First Meeting

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- Market yourself: you are recruiting mentor
  - Don't have to ask formally at a 1<sup>st</sup> meeting
- Communicate clear goals & needs
  - Being prepared demonstrates organization
- Give positive feedback
- Bring a specific and limited request for help to engage the prospective mentor (e.g., research idea)
  - Ask permission to request more help later
  - State exactly what the help might be
- Be accountable: follow up & stay engaged
  - Make mentor feel appreciated

# Initiation

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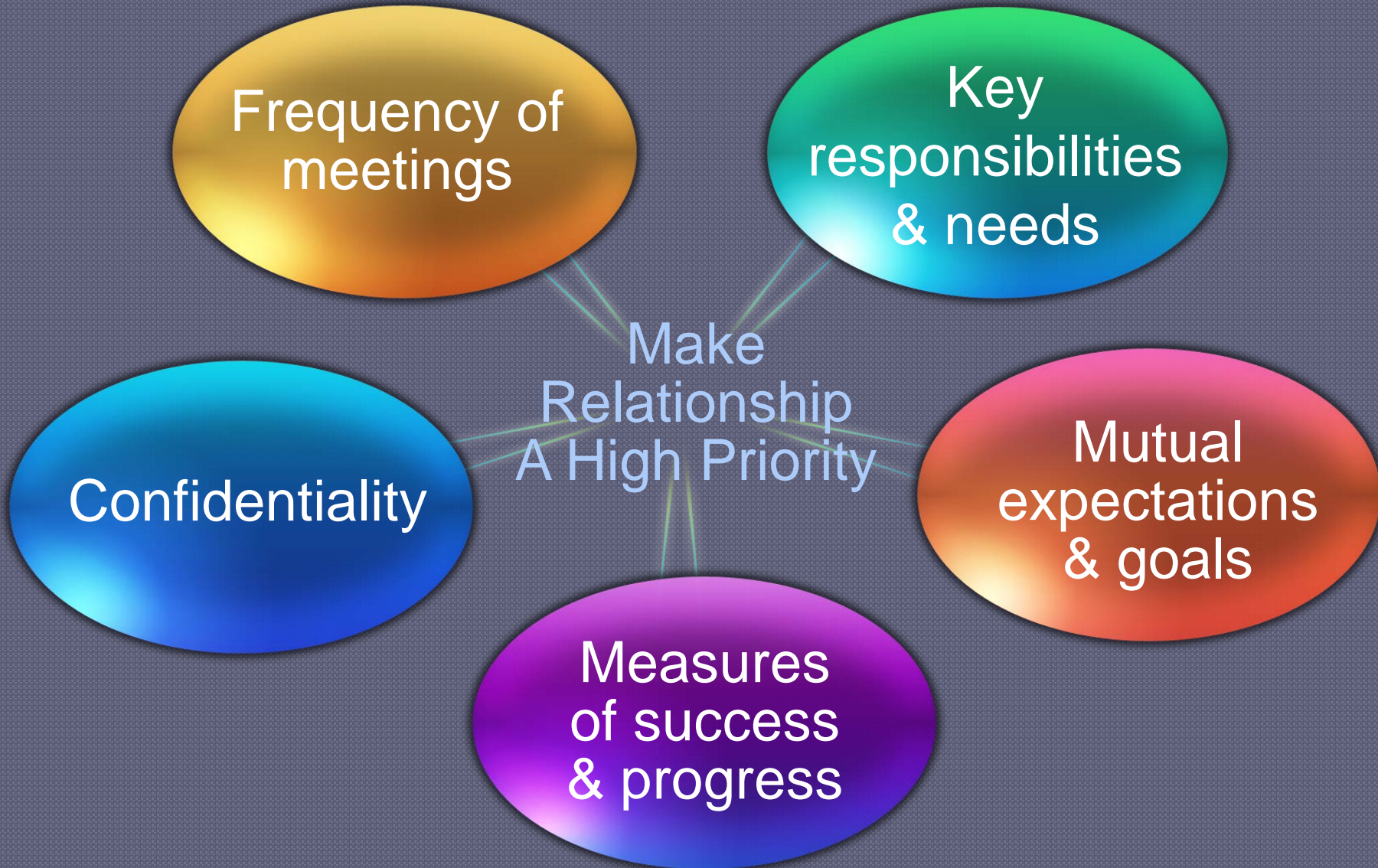


# Cultivation



# Cultivation:

## Agreement on Structure and Objectives



# Individual Development Plans

NOT-OD-13-093: NIH Encourages Institutions to Develop Individual Development Plans for Graduate - Windows Internet Explorer

http://grants.nih.gov/grants/guide/notice-files/NOT-OD-13-093.html

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NOT-OD-13-093: NIH Encourages Inst...

## NIH Encourages Institutions to Develop Individual Development Plans for Graduate Students and Postdoctoral Researchers

**Notice Number:** NOT-OD-13-093

### Key Dates

**Release Date:** July 23, 2013

### Issued by

National Institutes of Health ([NIH](#))

### Purpose

The purpose of this Guide Notice is to announce that NIH encourages institutions to assist graduate students and postdoctoral researchers to develop Individual Development Plans (IDPs) for graduate students and postdoctoral researchers (including scholars, trainees and fellows, and individuals in other postdoctoral positions) supported by NIH awards by October 2014.

### Background

A Working Group of the Advisory Committee to the NIH Director (ACD) recently completed a study of the future of the biomedical research workforce and training of graduate students and postdoctoral researchers to attract and retain the best and most diverse scientists, and to ensure that postdoctoral scientists to successfully participate in a broad-based and evolving economy. The recommendations included...

### Implementation

NIH encourages institutions to develop Individual Development Plans (IDPs) for graduate students and postdoctoral researchers supported by NIH. It is important to assist graduate students and postdoctoral researchers to achieve their career goals and become contributing members of the research community. IDPs should be implemented for every graduate student and postdoctoral researcher supported by any NIH grant by October 1, 2014. At that time, NIH will begin to encourage grantees to report the use of these IDPs on the progress report, regardless of the type of NIH grant that is used for support. NIH does not expect institutions to include the actual IDPs; instead the report would outline current practices that document that IDPs are used to help manage the training for those individuals.

For those institutions that have institutional IDP policies already in place, NIH encourages the grantees to implement the actual reporting of IDPs after October 18, 2013 for those programs that are using the RPPR currently, with the exception of institutional training grants as described below. As additional programs transition to the RPPR, reporting IDPs will also become a part of those submissions. In the RPPR, grantees are encouraged to report the use of IDPs in RPPR *Section B. Accomplishments*, Question B.4 for all graduate students and/or postdoctoral researchers reported in *Section D. Participants* or on a Statement of Appointment Form (PHS2271). For those institutions that have not developed IDPs to date, NIH encourages the grantees to begin the implementation and reporting by October 1, 2014.

Training grant recipients that use the PHS2590 progress report should include information to document that IDPs are used to help manage the training for graduate student and postdoctoral researchers in the progress report under 5.1.6 Progress Report Summary, A. Training Program (see instruction 1 on page 26 of the PHS 2590 instructions at [grants.nih.gov/grants/funding/2590/phs2590.pdf](http://grants.nih.gov/grants/funding/2590/phs2590.pdf)). NIH encourages those recipients that have institutional IDP policies in place to begin reporting the information in October 2013. For those training grant recipients that have not developed IDPs to date, NIH encourages the grantees to begin the implementation and reporting by October 2014.

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**University of Washington Department of Medicine**  
**Junior Faculty Mentorship Program**  
**Individual Development Plan**  
**Annual Assessment**

**Name:**

**Division:**

**Date:**

**1. Present faculty track (check one)**

- Clinician-teacher \_\_\_
- Physician-scientist \_\_\_
- Scientist \_\_\_

**2. Primary Mentor:**

**3. Other Mentor(s):**

**4. Present Academic Activities**

Please indicate your estimated percent for each of the areas below (not to exceed 100%).  
Describe briefly your key activities in each area.

- Clinical Service: \_\_\_\_\_%
- Teaching: \_\_\_\_\_%
- Research: \_\_\_\_\_%
- Administration: \_\_\_\_\_%
- Other (please describe) \_\_\_\_\_%

**5. Three to Five Year Vision and Goals**

In one paragraph (or bullets), describe your overall 3-5 year career plan.

# Individual Development Plans

Will be required by NIH for all K awardees  
and T awardees

# Individual Development Plans

## 6. ONE YEAR PLANNING DOCUMENT

(use additional pages if needed)

ACTIVITY	SPECIFIC OBJECTIVES	HOW TO ACHIEVE?	BENCHMARKS	WHO IS MENTOR FOR THIS ACTIVITY?
<b>CLINICAL</b> (if applicable)	1.  2.			
<b>TEACHING</b> (if applicable)	1.  2.			
<b>RESEARCH</b> (if applicable)	1.  2.			
<b>ADMINISTRATION</b> (if applicable)	1.  2.			
<b>OTHER</b>				

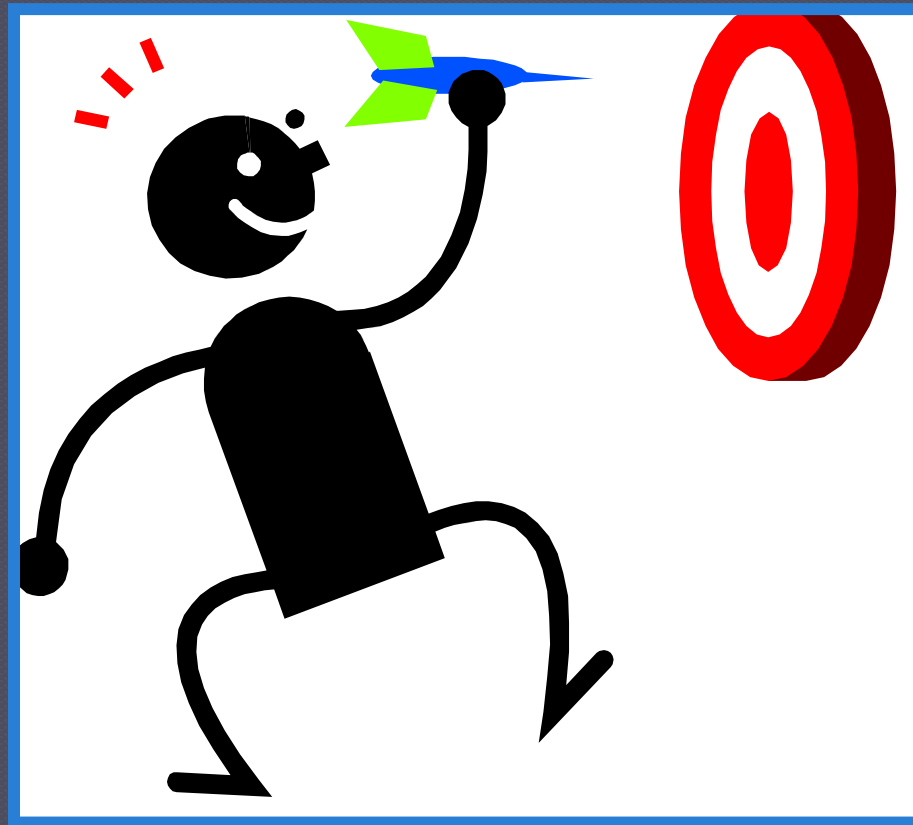
# Cultivation: Managing Up

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- Understand yourself and your mentor—Goal is *to develop a healthy working relationship compatible with each person's work style and expectations*
- The mentee takes ownership of the relationship
  - Let your mentor know what you need
  - Set own goal schedule and stick to it
  - Be responsive to suggestions
  - Make yourself available, be flexible
  - Straightforward, bring up issues
  - Directly ask how success judged

# Managing Up

**Mentor**

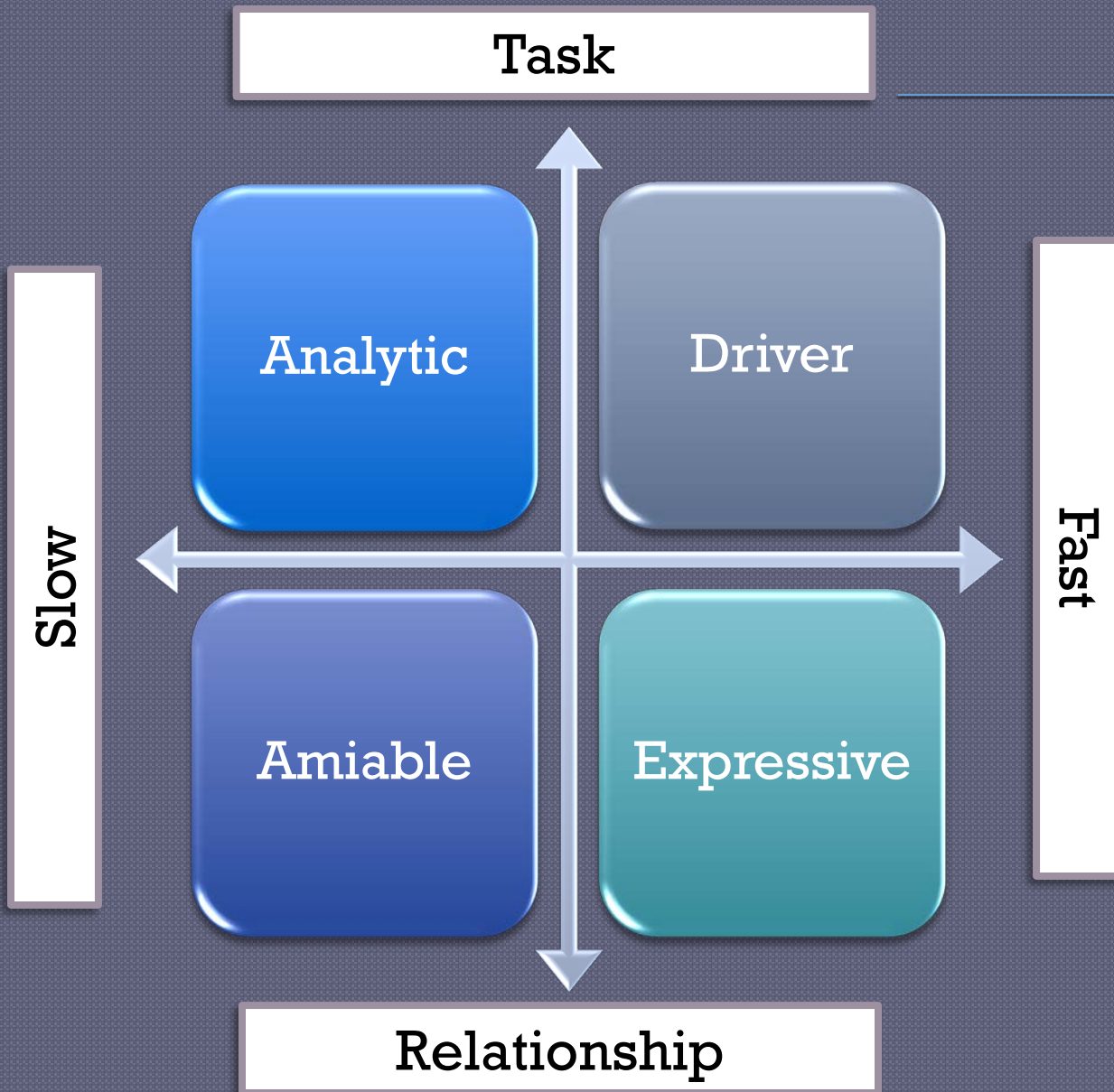


**Mentee**



# Understanding Work Styles

Robert Bolton





# Managing Up - Communication

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- Manage the flow of information
- Ask directly about mentor's preferred style
  - Detailed facts/figures vs. overview
  - Email vs. phone
  - Listener vs. reader
- Listen actively, ask questions
- Avoid defensiveness—your goal is to improve
- Think very carefully if disagree
  - Should put forth own ideas
  - Disagree respectfully, ask clarifying questions

# Meetings

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- Agree on regular meeting schedule
- Set agenda for meetings
  - Check-in
  - Discussion of 2-3 topics
  - Long-term goals
  - Short-term action items
- Actively inform on progress in preferred style
- Identify what is expected prior to next meeting

*Use your mentor's time wisely!*

# Stages of Mentoring

*Kathy Kram*

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**Initiation**

Initially hierarchical

**Cultivation**

Interactive sharing

**Separation**

Plan to independence

**Redefinition**

Collegial relationship

# Separation

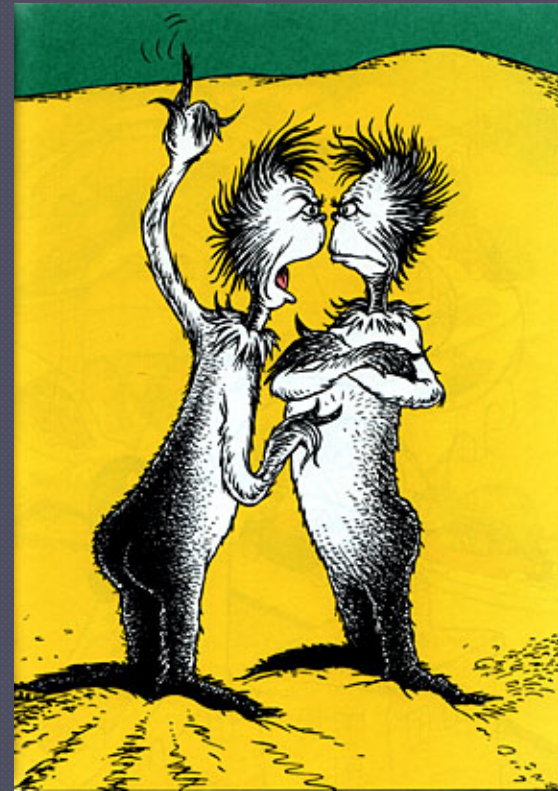
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- ◉ A natural evolution
- ◉ Ideally, a planned separation as mentees achieve goals and independence
- ◉ Are there future mentoring needs?
- ◉ Work toward a collegial relationship

# Separation

## ◎ But...

- Marked by conflict and negative emotions
- Anxiety
- Guilt
- Abandonment
- Resentment



# Redefinition

- ◉ A new relationship
- ◉ Peer and colleague
- ◉ Friendship
- ◉ Gratitude



# Special Situations

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# Special Situations

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- ◉ Multiple mentors
- ◉ Long distance
- ◉ Dissatisfaction/problems



# Multiple Mentors: **Necessity**

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- ◎ **Ways to make it work:**
  - Clear roles & expectations
  - Good relationship among mentors
  - Complementary experience
- ◎ **Potential problems**
  - Unclear expectations
  - Disagreement or competition
  - Inefficient/overlap

# Long Distance

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- ◎ Ways to make it work
  - Establish locally and then continue
  - Occasional face time at meetings
  - Clear expectations
- ◎ Potential problems
  - Not as effective as on-site
  - Lack of direct observation
  - Problems with email or phone

# Dissatisfaction and Termination

- Society of General Internal Medicine mentoring survey
  - 84% unsatisfactory mentoring relationship
  - 23% terminated mentoring relationship
- Most common complaints
  - Mentee did not follow through
  - Mentee did not use mentor's time effectively
  - Poor fit with work style and/or personality

# Dissatisfaction

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- ⦿ Mismatch of goals, commitment, expectations
- ⦿ Reluctance to own and pursue own development
- ⦿ Reluctance to ask for personal help
- ⦿ Mentor or mentee can suggest change
  - Depends on style how approach
  - Ask for advice

# Know yourself

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- ◉ Work style
- ◉ Other important relationships
  - Parents, teachers, coaches, professors
- ◉ Sources of conflict
- ◉ Sources of stress
- ◉ Common issues
  - Need to please others
  - Independence
  - Control
  - Confidence

# Conclusion

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- ◎ Mentees have an active role in mentoring
  - Know values
  - Know needs
  - Know styles
  - Manage up
  - Show appreciation
- ◎ Mentoring requires time and nurturing
  - Worth the effort!

# Cases and Discussion

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# Case #1

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Watson is in his 4<sup>th</sup> month of research. He sets up a meeting with his mentor to discuss his project. He wants to discuss an idea for a dose-response study and adjustments to protocols for his immuno-assays. He states the problem as he sees it. The mentor then interrupts and spends the rest of the meeting talking about ideas for future experiments, including mouse genetics. Watson feels overwhelmed by all there is to do, stops the planned experiments and spends the week learning about conditional knockouts. Watson starts presenting what he has learned plans at next meeting, but the mentor says, “Oh, we don’t have the facilities ready to do mouse genetics now.” The mentor then wants to know the results of Watson’s experiments, but Watson hasn’t done them and leaves feeling awful.

- What are sources of conflict and stress in this mentoring relationship?
- How can Watson respond?



## Case #2

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John just started a fellowship and is finding his mentor is somewhat absent. He finds it takes several emails and phone calls in order to set up a meeting and once he has a meeting with his mentor she interrupts their conversation to answer the phone and works on email while they are talking. He feels like she doesn't have time to help guide him. He has asked her about other people who might be able to help him with his projects and the only person she suggested wrote back "too busy" to his email request.

- What should he do?
- How do you know if the problem is you?
- When do you end a mentoring relationship vs. trying to work on it more?
- How do you end a mentoring relationship?

## Case #3

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Siri, a Fellow, has been working in her mentor's large laboratory for several years. She has led several projects to completion and publication. Her mentor recently assisted her to write her K award, which scored well but was not funded in the first submission, and she is truly grateful for the time and work he put in. Recently, though, she feels annoyed that her mentor has been putting excessive demands on her unrelated to her own studies. He is increasingly critical of her work, and seems to be nit-picking her writing and proposed studies. She wants to stay at her current institution and her Dept. is supportive, but her mentor keeps talking about her role on his pending grants. Siri is thinking about seeking other positions where she can be truly independent.

- How are Siri and her mentor doing at managing Siri's transition to independence?
- Is it necessary to move to achieve independence?

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# Thanks!

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- ◎ Judy Zerzan
- ◎ My mentors and (getting to be...) colleagues
  - Dedra Buchwald
  - Jack Goldberg
  - Mike Schwartz
  - David Cummings
  - Ginny Broudy
  - Tom Grabowski
  - Joann Elmore
- ◎ For your time and attention

# Availability—the open door

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- ⦿ *“M was always accessible, and she always made it abundantly clear to her students that she would rather talk about science with them than do just about anything else.”*

# Inspiration

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- ⦿ *“On many occasions I remember walking into her office convinced that I had been wasting my time, and then ten minutes later walking out with a smile and the sure knowledge that what was a bad result was indeed just what I needed!”*