

## MENTORING PLAN WORKSHEET

### Seek Mentorship

Mentoring is a critical component of the development of the next generation of scientists. Use it.

### Know Yourself

Spend some time understanding your own internally defined "true north". For instance, you might work on answering these questions:

What activities give you energy?

What activities take energy away from you and leave you feeling sapped?

What skills do you have?

What personality do you have?

Surround yourself by people who will promote growth in areas you feel deficient.

### Articulate Goals

Prior to meeting with a potential mentor, take some time to think about and write down your professional goals. You may want to articulate one year goals and five year goals. For example, a short-term goal might be "to submit a CIHR New Investigator award application" and a long term goal might be "to have enough publications and grants for promotion to Associate Professor".

Short term goals (next year)	Long term goals (next 3-5 years)

### Get Your Story Straight: "The Elevator Pitch"

<http://www.cbc.ca/undertheinfluence/season-3/2014/04/05/elevator-pitches-1/>

Imagine that you just stepped onto the elevator with the CEO and Scientific Director. He turns to you and says, "tell me what you do here at the Institute". What is your 2-3 line (i.e. succinct one minute) answer?

## Identify Mentorship Needs

Identify competencies for which you feel you lack expertise. Identify people who can assist you in achieving these competencies and in meeting your goals. These can be mentors internally or externally. A blank grid is included on the last page to help you organize your thoughts. Put your initial thoughts down on paper before you approach a mentor, and then revise it as your relationship changes.

### **Competencies I Need to Develop**

- |   |   |  |
|---|---|--|
| <input type="checkbox"/> Designing research     | <input type="checkbox"/> Writing grants       | <input type="checkbox"/> Managing your career      |
| <input type="checkbox"/> Leading teams          | <input type="checkbox"/> Cultural competence  | <input type="checkbox"/> Managing care             |
| <input type="checkbox"/> Speaking before groups | <input type="checkbox"/> Teaching effectively | <input type="checkbox"/> Collaborating effectively |
| <input type="checkbox"/> Managing data          | <input type="checkbox"/> Writing manuscripts  | <input type="checkbox"/> Networking                |
| <input type="checkbox"/> Finding resources      | <input type="checkbox"/> Managing time        | <input type="checkbox"/> Establishing goals        |
| <input type="checkbox"/> Finding funding        | <input type="checkbox"/> Managing staff       | <input type="checkbox"/> Preparing for promotion   |
| <input type="checkbox"/> Navigating institution | <input type="checkbox"/> Managing conflict    | <input type="checkbox"/> Knowing career paths      |
| <input type="checkbox"/> Hiring personnel       | <input type="checkbox"/> Managing budgets     | <input type="checkbox"/> Mentoring others          |
| <input type="checkbox"/> Giving feedback        | <input type="checkbox"/> Assessing students   | <input type="checkbox"/> Organizational dynamics   |
| <input type="checkbox"/> Evaluating literature  | <input type="checkbox"/> Medical Informatics  | <input type="checkbox"/> Developing Collaborations |

## Approach Potential Mentors Thoughtfully

Mentoring implies commitment, so consider starting small and building connections that could grow into a mentor-mentee relationship. Check out the potential mentor's track record with prior mentees. Consider starting with specific requests (for advice, for comment on a portion of a manuscript or grant).

Communicate your short and long term goals and explore whether there is a good fit. Discuss how you are hoping to work with the mentor, such as one-on-one, as one of many mentors, or as part of a mentoring "team" or "committee".

## Manage Yourself - Be In Charge

This is *your* program for you to use for your benefit. As the mentee you should plan to drive the mentor-mentee relationship. **The mentor does not want to be your boss**; they are there to share experience and answer questions.

## Manage Relationships with Mentors Thoughtfully

Relationships should be nurtured and respected. If you and your proposed mentor develop a working relationship, have some guidelines for how you will work together. Here are some tips:

- Schedule standing meetings ahead of time and keep them
- Set and share agenda in advance (see box on page 3 for sample agenda items)
- Give your mentor(s) plenty of time to review drafts of grant and manuscripts
- Develop authorship protocols early in the project so that expectations are clear
- Make a work plan and a timeframe and share with your mentor
- Saying "thank you" is priceless
- Don't be a "black hole of need" – limit the amount of request you ask of any given mentor
- Plan to evaluate the relationship periodically

### **Sample Meeting Agenda Outline**

Any urgent issues?  
Items pending from last session?  
Research  
Clinical  
Administration  
Teaching  
Training/supervision  
Work-life balance  
Career guidance  
Actions, by whom and when  
Next meeting day and time

### **Know Your Mentor**

How does your mentor like to receive communication? How do they want to hear from you?

How do they process information best (written vs talking, stories vs data, big picture vs details)

How might things like generation, gender or cultural background affect the mentoring relationship?

Think about what *you* bring to the relationship and how your association may *benefit* your mentor.

### **Know Your Environment**

Learn to read the signals of your professional culture. It is easy to misinterpret communication, so make it a habit to check out your perceptions with colleagues, and mentors. For instance, if your mentor does not respond to your email, does that mean he/she is sending you a message about how unimportant you are? Or does it mean they are swamped with incoming messages and haven't gotten to yours yet? Or does it mean that they are working on an answer and will get back to you? If you get critical comments on your CIHR grant review, does it mean you have no chance of getting funded? Or is the message actually one that is encouraging you to make specific changes and reapply? Get help interpreting the signals before jumping to a wrong conclusion.

### **Think About How You “Look” To Others**

When someone else reads your CV, what do they conclude about your skills and priorities?

Does your committee work reflect your priorities? Ask your mentor and your chief/chair to look at your CV and give you feedback about it on an annual basis.

Are you current in databases that present the face of faculty to the world? For instance, when did you last update your profile on the Children's Hospital Research Institute of Manitoba's website ([www.chrim.ca](http://www.chrim.ca))? When was the last time you updated your picture? Take every opportunity possible for you or your trainees to present your group's work locally so that your expertise and capacities become well known.

### **Network**

Networking – building collegial professional relationships – helps combat isolation (a big source of faculty dissatisfaction). It builds capacity for informal mentoring, and access to information and resources.

**Incorporate the Institute staff into your network of colleagues.** They make the Institute run and often know a lot about the organizational culture - and “how things get done around here”. Get to know them and learn from them. Also, cultivate colleagues outside of the institution.

## Annual Review

This should be from your Department Head or Director. Your mentor may assist you in preparation. The goal is to identify strengths and weaknesses in your portfolio so that you can address them in preparation for promotion and success in your field. As an example of an annual review format, you might provide your updated CV (academic "draft" CIHR format acceptable), a personal statement, and your 1- and 3-5-year goals to your reviewer before the meeting. Be prepared to ask questions during the meeting. Below are some sample questions.

- What areas would you recommend I work on over the next year in order to build a strong portfolio for promotion?
- Are there some specific milestones that I should work toward in order to strengthen my candidacy for promotion and/or tenure?
- Your support is important to me. Can you offer any feedback or suggestions that would enable you to strongly support my promotion?

## Develop Yourself

Know your institution. Take advantage of resources and professional development opportunities offered by the U of M and other professional societies. Some useful links are provided below.

- University of Manitoba resources
  - [http://umanitoba.ca/research/ors/internalfunding\\_deadlines\\_forms.html](http://umanitoba.ca/research/ors/internalfunding_deadlines_forms.html)
  - <http://umanitoba.ca/research/tto/index.html>
  - <http://umanitoba.ca/research/integrity/>
  - [http://umanitoba.ca/research/media/Responsible\\_Conduct\\_of\\_Research.pdf](http://umanitoba.ca/research/media/Responsible_Conduct_of_Research.pdf)
  - [http://intranet.umanitoba.ca/academic\\_support/catl/](http://intranet.umanitoba.ca/academic_support/catl/)
  - [http://intranet.umanitoba.ca/academic\\_support/catl/programs/](http://intranet.umanitoba.ca/academic_support/catl/programs/)
  - <http://umanitoba.ca/faculties/coned/coned/professionaldevelopment/index.html>
  - [http://umanitoba.ca/admin/vp\\_academic/media/UM\\_UTS\\_handbook.pdf](http://umanitoba.ca/admin/vp_academic/media/UM_UTS_handbook.pdf)
  - <http://umanitoba.ca/7819.html>
- Resources from other professional societies and healthcare organizations
  - <http://www.royalcollege.ca/portal/page/portal/rc/resources/nss>
  - <http://chimb.ca/>
  - [https://www.cma.ca/en/Pages/cma\\_default.aspx](https://www.cma.ca/en/Pages/cma_default.aspx)
  - <http://www.healthcarecan.ca/about/events/national-health-leadership-conference/>

***If a man knows not what  
harbor he seeks, any wind  
is the right wind.***

-Seneca

**Setting Goals** From <http://www.topachievement.com/smart.html>

"Keep your eye on the prize."

**Creating S.M.A.R.T. Goals**

**S**pecific

**M**easurable

**A**ttainable

**R**ealistic

**T**imely

**Specific** - A specific goal has a much greater chance of being accomplished than a general goal. To set a specific goal you must answer the six "W" questions:

\*Who: Who is involved?

\*What: What do I want to accomplish?

\*Where: Identify a location.

\*When: Establish a time frame.

\*Which: Identify requirements and constraints.

\*Why: Specific reasons, purpose or benefits of accomplishing the goal.

EXAMPLE: A general goal would be, "Get in shape." But a specific goal would say, "Join a health club and workout 3 days a week."

**Measurable** - Establish concrete criteria for measuring progress toward the attainment of each goal you set. When you measure your progress, you stay on track, reach your target dates, and experience the exhilaration of achievement that spurs you on to continued effort required to reach your goal. To determine if your goal is measurable, ask questions such as How much? How many? How will I know when it is accomplished?

**Attainable** - When you identify goals that are most important to you, you begin to figure out ways you can make them come true. You develop the attitudes, abilities, skills, and financial capacity to reach them. You begin seeing previously overlooked opportunities to bring yourself closer to the achievement of your goals.

You can attain most any goal you set when you plan your steps wisely and establish a time frame that allows you to carry out those steps. Goals that may have seemed far away and out of reach eventually move closer and become attainable, not because your goals shrink, but because you grow and expand to match them.

**Realistic** - To be realistic, a goal must represent an objective toward which you are both *willing* and *able* to work. A goal can be both high and realistic; you are the only one who can decide just how high your goal should be. But be sure that every goal represents substantial progress. A high goal is frequently easier to reach than a low one because a low goal exerts low motivational force. Some of the hardest jobs you ever accomplished actually seem easy simply because they were a labor of love.

Your goal is probably realistic if you truly *believe* that it can be accomplished. Additional ways to know if your goal is realistic is to determine if you have accomplished anything similar in the past or ask yourself what conditions would have to exist to accomplish this goal.

**Timely** - A goal should be grounded within a time frame. With no time frame tied to it there's no sense of urgency. If you want to lose 10 lbs, by when do you want to lose it? "Someday" won't work. But if you anchor it within a timeframe, "by May 1st", then you've set your unconscious mind into motion to begin working on the goal.

**T** can also stand for **Tangible** - A goal is tangible when you can experience it with one of the senses, that is, taste, touch, smell, sight or hearing. When your goal is tangible you have a better chance of making it specific and measurable and thus attainable.

<b>Mentoring Plan</b>		
<b>Mentor Name</b>		
<b>Outcomes (What I Want)</b> <i>(ex., submit multi-center research grant proposal)</i>	<b>Objectives (What I Need)</b> <i>(ex., understand how to manage multi-site research projects and with whom I should collaborate)</i>	<b>What I can offer (What I Have)</b> <i>(ex., grant writing, publications)</i>

<b>Mentor Name</b>		
<b>Outcomes (What I Want)</b> <i>(ex., submit multi-center research grant proposal)</i>	<b>Objectives (What I Need)</b> <i>(ex., understand how to manage multi-site research projects and with whom I should collaborate)</i>	<b>What I can offer (What I Have)</b> <i>(ex., grant writing, publications)</i>

References: <http://facdev.medschool.duke.edu>  
<http://cchcsp.ca/>