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Clinician-trialist rounds:

9. Mentoring – part 3: the structure and function of effective mentoring: advice and protection

Sharon E Straus* and David L Sackett

The first of the four *Clinician-Trialist Rounds* in this series summarized some evidence on why clinician-trialists like you had better get mentored if you want to achieve academic success, realise personal satisfaction, and have fun [1]. The second [2] described how effective mentoring makes sure that mentees are linked to excellent mentors, obtain the resources required for success, and are offered the full spectrum of academic opportunities. This *Round* completes the description of effective mentoring by describing how it offers both career and personal advice, and provides protection from academic predators. In preparing these Rounds, we've drawn upon both the relevant literature and our own previous works on these matters [3,4].

Career and personal advice

By advice, we mean providing you with frequent, unhurried, and safe opportunities to think your way through both your academic and personal development. Mentees have to take charge here, presenting the issues, challenges, and problems you are facing; we suggest that mentees come to these meetings with a prepared agenda, outlining the issues they want to cover. In responding, effective mentors practice 'active listening', that 3-step process we hope you incorporated into your clinical skills as a medical student [5]:

- Making sure they comprehend what you are 'saying' through both your words and body language,
- Making sure they retain what you're communicating, and

- Making sure they avoid roadblocks that often interfere with communication (such as interrupting you, moralizing, labelling, making authoritarian pronouncements, or dismissing your concerns).

Thus, effective mentors employ a 'reiterate and review' process in which they summarize and clarify the discussion topics and action items to ensure mutual understanding of the issues and what is to be done about them. The mutual objective is your development as an independent thinker.

At the start of your career, topics for discussion include your choices of graduate courses, recognizing the methodological challenges in your research projects, developing your thesis proposal, and the pros and cons of 'interning' with a particular research group. But of at least equal importance, both at the start and throughout your career, is how well you are balancing your career with the rest of your life. For example, some mentors employ checklist or task lists to frame this discussion to ensure that time is spent addressing the full range of your career, administrative, educational and work-life/balance issues, sometimes refusing to discuss academic issues until you have explored your personal and family health, relationships, finances, and the like. We've observed that issues around work-life balance are sometimes the last items on the list for discussion and may get deferred to future meetings when time runs short; by reviewing the agenda or checklist at the beginning of the session and prioritising the topics for discussion, this can be avoided. The mentor's checklist that Sharon Straus uses is in Table 1.

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Table 1. The mentoring checklist used by Sharon Straus

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- 1) Greet and quickly assess the mentee:
 - a) Check in.
 - b) Determine whether there are any urgent issues, and put them at the top of the agenda.
 - 2) Set an agenda for today's session:
 - a) Review any items pending from last session:
 - i) Administration (hospital, university, provincial, national, international)
 - ii) Clinical (inpatient, outpatient, on-call responsibilities)
 - iii) Research (publications, grants, presentations, grant review panels)
 - iv) Teaching/training/providing mentoring (undergraduate, postgraduate, graduate, continuing education)
 - v) Creative professional activity (specify)
 - vi) Work-life balance
 - vii) Career guidance (review individual development plan and CV)
 - b) Assess the time available for today's session.
 - c) Prioritise the agenda items and get started.
 - 3) As you assist and advise your mentee:
 - a) Ask clarifying questions (especially about 'priority lists')
 - b) Set clear and measurable goals
 - c) Offer advice and suggest resources
 - d) Agree on deadlines
 - 4) Offer opportunities for collaboration in research, teaching and writing.
 - 5) Offer advocacy and protection: Outline what actions are needed, by whom and when.
 - 6) Wrap up:
 - a) Clarify expectations and deadlines for both mentor and mentee.
 - b) Schedule the next meeting.
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Source: Data from An expansion of Dr Mitchell Feldman's Mentor's Meeting Checklist. http://academicaffairs.ucsf.edu/mentoring/mentor_meeting_checklist.php

As long as gender-based inequalities exist in running households and raising children, mentors must be knowledgeable and effective in addressing and advising around the special problems that face women in academic careers. Although only 20% of female academics in one study stated that it was important to have a mentor of the same gender, it is imperative that all women pursuing academic careers have easy access to discussing and receiving informed, empathic advice about issues such as timing their pregnancies, parental leave, time-out, part-time appointments, sharing and delegating household tasks, and the like. When the principal mentor is a man, these needs are often best met by specific additional mentoring around these issues from a woman who has balanced these issues. More recently, we have seen junior male colleagues taking a more active role in child care, facing the issues that women have dealt with for many years and, for example, seeking advice about male parental leave. It is important for all mentees to have easy access to advice from a man or woman who have had these experiences.

The real crunch for mentoring comes when you receive a job offer. When listening to you sort through it, effective mentors help you recognise the crucial difference between 'wanting to be wanted for' and 'wanting to do' a prestigious academic post. You'd be crazy not to feel elated at 'being wanted

for' any prestigious job, regardless of whether it matched your career objectives and academic strengths. However, an 'actively listening' mentor can help you decide whether you really 'want to do' the work involved in that post. This is a good time to compare your job offer with the current version of your 'priority list' as described back in the second *Clinician-Trialist Round* [6]. The ensuing discussion may help you realize that the post is ill-matched to your interests, priorities, career stage, competencies, or temperament.

Protection

By protection, we mean insulating you not only from needless academic buffeting but also from the bad behaviour of other academics. Because science advances through the vigorous debate of ideas, designs, data, and conclusions, you should get used to having yours subjected to keen, constructive, and critical scrutiny. For the same reason, you needn't be tossed in at the deep end. Thus, for example, you should rehearse formal presentations of your research in front of your mentor (and whoever else is around). They can challenge your every statement and slide in a relaxed and supportive setting. As a result (especially in these days of PowerPoint), you

can revise your presentation and rehearse your responses to the questions that are likely to be asked about it. The objective here is to face the toughest, most critical questions about your work for the first time at a rehearsal among friends, not following its formal presentation among rivals and strangers.

Similarly, your mentor can help you recognize the real objectives of the critical letters to the editor that follow your first publication of your work. Most of them are attempts to show off (the 'peacock phenomenon'), to protect turf, and to win at rhetoric, rather than to promote understanding (when serious scientists have questions about a paper, they write to its authors, not to the editor). Effective mentors will help you learn how to respond to such letters by repeating your main message, answering substantive questions (if any), and ignoring the tawdry slurs and put-downs that your detractors attempt to pass off as harmless wit.

Finally, disputes between senior investigators often are fought over the corpses of their mentees. This means you. If it wasn't already part of your core training, a study of the classic paper on 'how to swim with sharks' should be part of every mentee's education [7].

Effective mentors intervene swiftly and decisively whenever they learn about such attacks on their mentees, including especially those related to your sex, gender, race, handicap, or orientation. These interventions, typically in the form of private meetings demanded by your mentor from your tormentor, don't merely correct matters of fact. They might employ longshoremen's vocabulary in describing the tormentor's bad behaviour and moral character, delivered at high decibels and in unmistakable anger, coupled with clear threats of retaliation if the bad behaviour is repeated (on one occasion in Canada, and again once at Oxford, Dave threatened to throw a mentee's tormenter down a flight of stairs if the attack was repeated). The primary intention of your mentor's rapid retaliation isn't to overcome your attacker's underlying prejudice or jealousy. Its goal is merely to make the repercussions of picking on you so unpleasant for them that they never try it again.

We assert that academics never outgrow their need for mentoring. Your mentors will change over time as your interests and career path change, but the need for mentorship remains constant. As you become an established investigator, you'll require gentle confrontation about whether you

are becoming a recognised 'expert' and taking on the bad habits that inevitably accompany that state [8]. Moreover, given the huge number of highly prestigious but simply awful chairs and deanships that are pressed upon even unsuccessful academics, these offers need the dispassionate (even cynical) eye of a mentor who can help you distinguish the golden opportunities from the black holes. Finally, mentors can help senior academics find the courage to seize opportunities for radical but fulfilling and even useful changes in the directions of their careers. For example, Dave Sackett is ever indebted to his then-mentor Bill Spaulding, who helped Dave confirm the sense, and then find the courage, to repeat his internal medicine residency at age 50.

As usual, that's not the end of this round, for our discussion period has just begun. Rounders who have other or contrary thoughts about effective mentoring or have questions or comments about the ones presented here are encouraged to send them to the Editors, with a copy to Dave at sackett@bmts.com. He'll summarize them in a later round.

The fourth and final *Clinician-Trialist Round* on mentoring will define the essential attributes of an effective mentor and help you decide whether and when you're ready to take on this role.

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