

# *Structuring the Mentoring Relationship: Expectations and Boundaries*

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BRIGHAM AND  
WOMEN'S HOSPITAL

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Department of Medicine



HARVARD  
MEDICAL SCHOOL

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[http://bwhmentoringtoolkit.partners.org/?page\\_id=45](http://bwhmentoringtoolkit.partners.org/?page_id=45)



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C E N T E R F O R



Faculty Development & Diversity

# Case

## Chris' Perspective

Chris was very excited about his new junior faculty position. Helen, the division chief, seemed supportive of his research interests, although they were different from her own. They met several times early on, and she was able to give him concrete suggestions on research strategies. However, soon after starting, Helen told Chris that she was too busy to be his research mentor and that Jonathan, another faculty member in the division, would serve in this role.

Chris started meeting with Jonathan and found he was a good listener and very empathetic, often sharing his own experiences and challenges along the way. Soon after, an opportunity arose for Chris to develop a research project in his area of interest, collaborating with Adam outside of the division. Jonathan encouraged him, and offered to continue as Chris' research mentor even though the topic and methods were outside of his area of focus.

As time progressed, Chris encountered several challenges in developing his project due to significant limitations given experience with statistical programming. Chris found a statistician willing to meet with him occasionally and give him general advice. While this helped, Chris still felt uncomfortable with the methodology and frustrated with the slow pace of the project. As Jonathan was not really helping him overcome these challenges, Chris scheduled meetings less and less frequently.

At the end of his 1<sup>st</sup> year, Chris and Jonathan were required by the division to fill out an assessment of Chris' research progress to date. Chris felt that his project has not gone well and that he did not have a mentor.

# Case Continued

## **Jonathan's Perspective**

Jonathan was a mid-level faculty member up for promotion to associate professor when Helen approached him to be Chris' mentor. In general, Jonathan's career was going well – he had adequate funding for his research and a good network of mentors and collaborators around him, and he had successfully mentored another new faculty member in the division to success in publication and funding. Jonathan loved talking to fellows and junior faculty about their work and their lives in general, sharing his own experiences and giving them advice. He had several mentees and felt that he did not really have the expertise Chris needed as a mentee but that he could not say no to his chief, Helen

Jonathan found it hard to help Chris overcome his project challenges and to give him general career advice, especially since Jonathan was not very familiar with Chris' research topic or the methods he was using for this project. He found it much harder to mentor Chris than his prior mentee, who had been working in Jonathan's area of interest, and had not required much structured oversight. Jonathan noticed over time that Chris was meeting with him less frequently but figured that was because he was now meeting with Adam. At the end of his 1<sup>st</sup> year, Chris and Jonathan were required by the division to fill out an assessment of Chris' research progress to date. Jonathan indicated that Chris has switched his mentor to Adam and that the form should go to him.

# Case Questions

## **Case Questions:**

1. What went wrong in the management of the mentor/mentee relationship?
2. Whose responsibility is it to maximize the success of the mentor/mentee relationship?
3. What might Chris and Jonathan have done differently in establishing and assessing the effectiveness of their relationship?
4. What might Helen, as a division chief, do differently to help oversee and increase the likelihood of establishing successful mentor/mentee relationships?

# Tips for Mentors and Mentees on Structuring the Mentoring Relationship

# Getting Started: Introductions

- Like in other relationships, the 2 parties need to introduce themselves including professional and personal identities.
- Mentor should
  - *model* by leading off about professional career: what she does now, how she got to current position, including school, training, career path, and faculty roles leading to present.
  - tell a limited amount about career fit with rest of life, e.g., marriage/partner, kids, and other interests. This helps mentee know whom he is dealing with.
  - then ask *mentee* to tell about his career to date, career aspirations, and briefly about the other parts of his life.

# Structuring Expectations

- Roles: The responsibilities of the mentor and mentee to each other.
  - What each person expects to happen in mentoring relationship: general advice, specific technical advice, sponsorship in academic institutions and organizations, guidance about career options, etc.
  - As a mentee, ask your mentor if she can provide what you believe you need to be successful.
  - As a mentor:
    - Ask the mentee to plan out the issues that need to be discussed at each meeting and to bring agenda
    - Provide and discuss examples when possible relevant to the mentee's work (e.g. an abstract, a paper, a grant)
    - Keep in mind the transition to "Letting go," i.e., delegate specific tasks to the mentee, as appropriate, to foster independence

# Structuring Expectations Continued

Mutually decide on/discuss:

- Practical details of the relationship: frequency, time, agenda, and format of meetings (in person, email, or phone).
- What each person expects the other to prepare before each meeting.
- When feedback will be given- set intervals for feedback sessions as well as indicate that feedback will also be given in real time

# Setting Boundaries of the Mentoring Relationship

- Discuss what mentoring is *not*, i.e., therapy, friendship, etc.
- Sometimes mentoring relationships evolve into friendships. To minimize complications, mentor may need to clarify when she is acting in role of mentor vs. friend.
- Establish parameters/timelines for expectations and re-evaluations (e.g., we will work together for 6 months and then re-evaluate; a draft of your grant is due in 2 months; you will need to get independent funding by 2016).

# How and When to Evaluate the Relationship

- Expectations of mentor & mentee need to match, or difficulties are likely.
- Expectations evolve over time, so they need to be reassessed regularly. Set up the expectation that the mentor and mentee will discuss their relationship at defined intervals and provide feedback.
- Set a mutually defined period after which the mentoring relationship will be re-evaluated. Agree to be direct with each other during and between the periodic evaluations of the relationship, especially if either party feels something needs to change.
- Establish and assess milestones.
- Discuss a “no-fault escape clause” if either feels the mentoring relationship is not a good fit and/or another person would be a better fit for the mentee.

# Mentor/Mentee Fit

- “It is easier not to hire than to fire,” so heed warning signs and spend time thinking through the pros and cons before agreeing to a mentoring relationship.
- Recognize when and how to “unfreeze” or end a relationship that is no longer productive, helpful for the mentee, or otherwise not meeting its goals.
- Recognize the reciprocal nature of the mentoring relationship.
- Once you realize that a mentoring relationship is not effective, think carefully about when and how to end the relationship.
- If bad fit/mismatch is identified: Have a discussion of the expectations and support that can be provided.
  - Consider options for a better fit for the mentee.
  - Facilitate identification of an appropriate alternative mentor.
  - Remember that co-mentoring is also viable option.

# Mentoring Agreement BWH Template



## Brigham and Women's Hospital Mentoring Agreement Template

Mentor Name: \_\_\_\_\_

Mentor Email: \_\_\_\_\_ Mentor Phone: \_\_\_\_\_

Assistant Contact: \_\_\_\_\_

Mentee Name: \_\_\_\_\_

Mentee Email: \_\_\_\_\_ Mentee Phone: \_\_\_\_\_

Assistant Contact: \_\_\_\_\_

Date: \_\_\_\_\_

### Content

1. Mentoring is most effective when it can be directed towards development in general areas (i.e. clinical care, research, clinical or didactic teaching, course development, program development, leadership, mentoring, supervision, or other administrative tasks). What one or two areas would you like this mentoring relationship to focus on?  
\_\_\_\_\_
2. Within each area, what specific guidance would be helpful (e.g. skill acquisition, developing a niche, work-life balance, networking, etc.)?  
\_\_\_\_\_
3. Career development goals-What does the mentee envision doing in 3, 5, and 10 years?  
\_\_\_\_\_

4. What metrics can be measured to indicate that this is a successful mentor/mentee relationship (e.g. number of papers, number of invited lectures, development of recognized niche)? What time table can be assigned to the achievement of these metrics?  
\_\_\_\_\_

### Logistics

1. Mentoring works best when both parties agree on the optimal method of contact (e.g. email, phone, in person). What type of contact works best for you?  
\_\_\_\_\_
2. For in-person meetings, it's helpful to characterize the basic elements. Consider the following:
  - a. How often will you meet? \_\_\_\_\_
  - b. How long will meetings last? \_\_\_\_\_
  - c. Where will the meetings take place? \_\_\_\_\_
  - d. Who will be responsible for scheduling meetings? \_\_\_\_\_
  - e. How much notice should the mentee provide the mentor ahead of meetings or requesting review of a project?  
\_\_\_\_\_

3. Acknowledging that certain periods during the year are busier for mentor and mentee, are there certain times (months or specific dates) in the next academic year that will be more difficult? (e.g. months on clinical service, specific meetings or vacations, grant deadlines)  
\_\_\_\_\_

4. Mentoring relationships frequently come to a point where the relationship is less "intense". Are there known "transition points" to this mentoring relationship (e.g. once a niche is "developed", known end of fellowship or grant, etc.)?  
\_\_\_\_\_

5. How frequently will the mentoring relationship/agreement be reviewed?  
\_\_\_\_\_

# Mentoring Agreement BWH Template

## Continued

### Other

1. Mentoring frequently work best when mentoring networks are established with a number of individuals who can mentor in their area of expertise. Has the mentee (or mentor) identified other people who are part of this network? Consider listing these individuals.

### Mentee and Mentor Expectations

1. Specific expectations the mentor has of the mentee:

2. Specific expectations the mentee has of the mentor:

3. Resolution process if problems arise:

4. Authorship rules for any academic publications produced from projects worked on jointly between the mentor and mentee:

5. Identified metrics for assessing the success of the mentoring relationship:

### Commitments of the Mentee

Please click the check box next to the statements that apply.

- I agree to uphold the guidelines, expectations, and goals outlined within this agreement in a respectful, ethical, and timely fashion.
- I acknowledge that I am primarily responsible for my own career development.
- I will seek regular feedback on my performance.
- I will request a formal evaluation annually.
- I will strive to maintain a relationship with my mentor that is based on trust and mutual respect.
- I will develop a mutually defined research/clinical/educational/career development project (circle all that apply) with my mentor that includes specific goals and timelines.
- I will perform my research/clinical/educational/career/program development activities (circle all that apply) in line with all relevant Partners Healthcare and Brigham and Women's Hospital policies and understand that I am responsible for my own compliance.
- I will respect the authorship guidelines stated in this agreement and communicate directly with my mentor if changes are required.
- (Insert additional commitments as needed)*
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# Mentoring Agreement BWH Template

## Continued

### Commitments of the Mentor

Please click the check box next to the statements that apply.

- I agree to uphold the guidelines, expectations, and goals outlined within this agreement in respectful, ethical, and timely fashion.
- I will provide the mentee with the required guidance and will seek the assistance of other faculty or institutional resources if necessary.
- I will provide a training environment that is suited to the needs of the mentee to ensure his or her professional and personal growth.
- I will provide regular feedback on the mentee's performance.
- I will complete a formal evaluation of the mentee annually.
- I will strive to maintain a relationship with my mentee that is based on trust and mutual respect.
- I will develop a mutually defined research/clinical/educational/career/program development project (circle all that apply) with my mentee that includes specific goals and timelines.
- I will respect the authorship guidelines stated in this agreement and communicate directly with my mentee if changes are required.
- I will support the mentee's attendance of professional organization meetings.
- I agree to support any mentored grants for which the mentee desires to apply.
- (Insert additional commitments as needed)
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Mentee Signature: \_\_\_\_\_

Mentor Signature: \_\_\_\_\_

Date: \_\_\_\_\_

# Mentoring Agreement AAMC

Compact Between Postdoctoral Appointees and Their Mentors

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## Commitments of Mentors

- **I acknowledge that the postdoctoral period is a time of advanced training intended to develop the skills needed to promote the career of the postdoctoral appointee.**
- **I will ensure that a mutually agreed upon set of expectations and goals are in place at the outset of the postdoctoral training period, and I will work with the postdoctoral appointee to create an individual career development plan.**
- **I will strive to maintain a relationship with the postdoctoral appointee that is based on trust and mutual respect.** I acknowledge that open communication and periodic formal performance reviews, conducted at least annually, will help ensure that the expectations of both parties are met.
- **I will promote all ethical standards for conducting research including compliance with all institutional and federal regulations as they relate to responsible conduct in research, privacy and human subjects research, animal care and use, laboratory safety, and use of radioisotopes.** I will clearly define expectations for conduct of research in my lab and make myself available to discuss ethical concerns as they arise.

<https://www.aamc.org/initiatives/research/postdoccompact/>

# Mentoring Agreement AAMC

## Continued

Compact Between Postdoctoral Appointees and Their Mentors



### Commitments of Postdoctoral Appointees

- **I acknowledge that I have the primary responsibility for the development of my own career.** I recognize that I must take a realistic look at career opportunities and follow a path that matches my individual skills, values, and interests.
- **I will develop a mutually defined research project with my mentor that includes well-defined goals and timelines.** Ideally, this project should be outlined and agreed upon at the time of the initial appointment.
- **I will perform my research activities conscientiously, maintain good research records, and catalog and maintain all tangible research materials that result from the research project.**
- **I will respect all ethical standards when conducting my research including compliance with all institutional and federal regulations as they relate to responsible conduct in research, privacy and human subjects research, animal care and use, laboratory safety, and use of radioisotopes.** I recognize that this commitment includes asking for guidance when presented with ethical or compliance uncertainties and reporting on breaches of ethical or compliance standards by me and/or others.

<https://www.aamc.org/initiatives/research/postdoccompact/>

# Structuring the Mentoring Relationship: Expectations and Boundaries Summary

- Mentor and mentee should decide early on the structure of the relationship
- Expectations of both the mentor and mentee from each other should be agreed upon
- Relationship should be mutually beneficial
- Interval for giving feedback for re-evaluation of progress of the relationship, its success and its continued duration should be set.

Pick one action you will do take in the next week to better clarify the structure of one of your mentoring relationships

