How to Get the Mentoring You Need in Research

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FAST-CAR, September 2019
Learning objectives

- Identify at least three types of mentors that may be useful in your early research career
- Describe strategies for initiating and maintaining satisfying relationships with different types of mentors
- Recognize the signs of dysfunctional mentoring relationships and identify ways to fix (or exit) relationships
- Learn how to use an Individual Development Plan to align goals and expectations with your mentors
Why is mentoring important?

Strong mentorship has been linked to:

• **Research productivity** (Steiner *et al.*, 2002; Wingard *et al.*, 2004)

• **Career satisfaction** (Schapira *et al.*, 1992; Beech *et al.*, 2013)


• **Career persistence** (Sambunjak *et al.*, 2010; Gloria *et al.*, 2001; Solorzano 1993)

• **Better leadership skills** (Gray & Armstrong 2003)
How does mentorship differ from other professional relationships?

The mentor-mentee relationship is:

- **Reciprocal and collaborative** - “two (or more) individuals who share mutual responsibility and accountability for helping a mentee work toward achievement of clear and mutually defined learning goals”

- **Longitudinal and comprehensive** – the mentor provides both instrumental support such as resources and opportunity, as well as psychosocial support to enhance the mentee’s sense of competence, identity, and effectiveness

Zachary L. Creating a mentoring culture.
Defining the ideal qualities of mentorship

Outstanding mentors….

1) exhibit admirable personal qualities, including enthusiasm, compassion, and selflessness;

2) act as a career guide, offering a vision but purposefully tailoring support to each mentee;

3) make strong time commitments with regular, frequent, and high-quality meetings;

4) support the personal/professional balance of their mentees;

5) leave a legacy of how to be a good mentor through role modeling and instituting policies

The multiplicity of roles fulfilled by mentors...

- Teaching scientific/medical knowledge and encouraging critical thinking
- Cultivating skills such as negotiation, grant writing, data analysis, publishing
- Assisting with obtaining jobs and choosing a career path
- Providing opportunities for networking
- Providing tangible resources (funds, staff, space)
- Giving encouragement and personal advice

What if you can’t get it all from one person?

- Junior researchers usually need help from multiple mentors with varying skills and areas of expertise.
- Diversifying mentor roles can safeguard against inadequate mentoring from any one person.
- Trainees may need to *actively seek out* a personalized, comprehensive mentoring portfolio.
- Rather than one or two individual mentor(s), some trainees need a mentoring “team” or “community”.

What does a ‘mentor network’ look like?

- Networks may include traditional and non-traditional mentors
- “Peer mentors” may fill in gaps left by traditional hierarchical mentors
- Inclusion of women or minorities may be important for those from underrepresented backgrounds
- Expansion of networks can address changing needs over time

Traditional research mentors

- **Primary research mentors** – responsible for the overall research and/or scholarly career guidance for their mentees

- **Career mentors** - responsible for overall career guidance and support for mentees in their own department/division

- **Project-specific mentors** - supervise the completion of a defined, time-limited research project

- **Co-mentors** - work with the mentee and other mentors as part of a team to provide more specialized expertise

Other mentor archetypes

- **Sponsors** - senior figures who use their influence to help high-potential individuals get jobs, join committees, etc.

- **Coaches** – individuals who help improve performance related to a particular issue—e.g., grant-writing, statistics

- **Connectors** – individuals who help mentors and mentees unite or foster other productive working relationships

- **Peer mentors** – individuals at the same or slightly higher level of the mentee who provide immediate advice

Peer mentors

- Provide advice about seeking mentorship from senior faculty
- Share strategies for negotiation, boundary setting, work-family balance
- Share cover letters, presentation materials, job talks, grant sections
- Provide moral support for the challenges of research and academic life
Factors to weigh in selecting mentors

- Senior versus mid career versus junior researchers
- Mentors outside of one’s own division or department
- Great researchers versus great mentors
- Mentors who are also bosses or supervisors
- Initial approachability or accessibility of mentors

- Vi
Why do mentors take on mentees?

- For the joy of helping junior researchers grow and develop
- To follow the example of their own research mentors
- To have a broader impact on their field of research
- To increase their productivity on papers, grants, etc.
- To facilitate their own academic advancement
- To offload time-consuming or unattractive tasks (Bad!)
- To flatter their own ego or wield power over others (Bad!)
Overall principles in dealing with mentors

- Be proactive
- Be respectful
- Be organized
- Be responsive
- Be appreciative
Seeking mentors—preparatory steps

- What working styles work best for me? Directive guidance or gentle supervision?

- What domains do I want to gain or develop? Research, personal, skill development, professional development?

- What specific opportunities am I seeking (papers, grants, training opportunities)?
Establishing new mentor relationships

- Familiarize yourself with the mentor’s background
- If possible, arrive with a preliminary research idea
- Share your own background, values, and needs
- Ask for more information about your mentor’s perspective
- If relevant, clarify tasks and timing of next meeting
- At the end, thank the mentor for any advice already given
Aligning expectations with mentors

- Focus groups exploring factors affecting the success of mentoring relationships at four CTSA sites
- Total of 55 scholars and 44 mentors, with scholars and mentors being interviewed separately.

  “How did you come to understand/communicate the expectations your mentor had at the beginning of your relationship?”

  “How did you learn what you could expect of your mentor and what she or he expected of you?”

  “How do you know what is up to your initiative and what is up to your mentor?”

Getting mentors to clarify what they want

“I have two mentors. I have one… I don’t know what that person wants from me. I try to tell him what I want from him, but… we don’t’ communicate. Then my other mentor says flat out: ‘These are my expectations of you. What do you expect of me?.. That is a very productive, great relationship.’

“I had a very directive mentor..., which was great for me…because I had no research experience, and [my mentor said] ‘We’re meeting once a week, and you’re going have this done in two days, have this done in five days’…. Not having any experience, it was the kind of thing that was very helpful early on….”

Defining roles in multi-person teams

- “We’re working on this project that has five people on it….We need to have clear rules about what part of the project I’m going to do…But we honestly have not been clear about it…. So I actually brought it up to our mentor today…”

- “If I were to enter into more co-mentoring situations… there would be something written down between me and the other mentor about who is going to be doing what and how things are going to work.”

Clarifying contributors from mentor vs mentee

- “As a junior [researcher], you’re not quite sure what you’re entitled to. You’re not exactly sure what the mentor is supposed to provide. So making sure that’s defined… might be helpful up front…”

- “I always ask…: ‘Hey, is there anything that you see that I’m doing that I should be doing differently…?’ There’s been some suggestions, which I’ve taken and applied.”

Aligning expectations about independence

- “My content mentor and I have very similar interests. The problem for me is carving out my niche. What am I going to be doing that she does not do?... What am I going to take on as my passion in all of this? How do I differentiate?”

- “It is always disturbing when you see your data that you thought had become your own project end up as a major thrust of your mentor’s grant.”

Getting to know your mentor’s style

- Does your mentor like to communicate by e-mail, phone, or both?
- Is your mentor a “listener” or a “reader”?
- How does your mentor tend to judge progress or success?
- Does your mentor like to weigh in early or late on written products?
- Does your mentor have any trigger points or pet peeves?
Developing a meeting schedule

Day 2
Still no sign of Prof. Jones...

My supplies are running low.
Not sure how much longer I can continue to wait for him to “stop by.”

I have calculated that 30 seconds is the maximum window I can run out and come back that still guarantees I’ll catch him if he makes an appearance.

Bathroom breaks have been... difficult.
Once coffee runs out, all hope is lost.
- a Grad Student in waiting.

WWW.PHDCOMICS.COM
Managing meetings with mentors

- Show up for scheduled mentor meetings on time
- Accept the responsibility for “leading” the meeting
- Prepare a (simple) agenda of topics to discuss
- At the end, summarize the agreements reached
- If the mentor is facing an emergency, offer to reschedule
- If you need to cancel, make sure the mentor gets word
Setting and reviewing measures of progress

- Develop a work plan that includes both short-term and long-term objectives
- When modifications seem necessary, discuss these with your mentor
- Clarify how often the faculty will give you feedback about your overall progress
How to help your mentors help you

- Share information about your successes – both big and small
- Give a heads up about vacation, deadlines, constraints
- Use modes of communication (e-mail, in person) intelligently
- Recognize the limitations of “old fogey” mentors
- Remind mentors when to put on their “mentor hat”
What causes mentoring relationships to fail?

- Individual, semistructured interviews with 27 medicine faculty at University of Toronto and UCSF
- Purposeful sampling of participants from each rank, gender, and academic stream
- “What is your experience with the mentorship you have received?” “If you have experienced a failed relationship, what was the impact on yourself and your mentor?”
- Most participants either had observed or participated in a failed mentoring relationship

What causes mentoring relationships to fail?

- **Poor communication**: “If you’re too intimidated by them to really talk honestly or openly or to really brainstorm about science with them, then it’s not a good mentoring relationship”

- **Lack of commitment**: “But mentors who you know get distracted or mentors who have other things that are clearly engaging their mind and not really able to focus, I think that would be an issue.”

- **Personal differences**: “If you have one person who doesn’t like to think on the fly, wants to have some time to think about it ahead of time and logically work it through, and they’re paired with somebody who just doesn’t think that way.”

What causes mentoring relationships to fail?

- **Perceived competition**: “In order for the mentee to be allowed to step out into the sunlight, it requires the mentor to step back and make sure the mentee receives credit for their portion of the work or maybe even the majority of the credit…”

- **Conflicts of interest**: “The mentor should not be in a position of authority over the mentee and should not be someone on whom they are dependent for resources, because it can lead to a conflict of interest between the needs of the mentors and mentees…”

- **Lack of experience**: “It failed because of the mentor’s lack of knowledge base to be able to provide advice… [The] mentor should be able to link the mentee to others who can fill these gaps.”

Common challenges—generational tensions

- **Mentee**: I don’t see her as a role model—all she does is work—I even overheard her say, “Ha! Take care of myself? I definitely don’t have time for that.”

- **Mentee**: Don’t established faculty realize how much harder it is now to “make it,” to get funded? Plus with our debt levels! And they think we act entitled!

- **Mentor**: Some trainees seem to think a mentor is someone who will rescue them—when they seem uncommitted, why should I bother?

- **Mentor**: My mentee is all about work–life balance, but she thinks nothing of giving me something to review with less than 24 hours warning!

Common challenges– gender & cultural issues

- **Mentee:** The other women and I experience our division chief as consistently marginalizing the women trainees, yet the other day he said to me, “I treat women equally, don’t you agree?” What do I say to him?

- **Mentor:** How can I tell this young woman that the form-fitting outfits she’s wearing are not professional?

- **Mentee:** My mentor seems to think that because I am Asian I will stay at the lab all night. But I want to spend time with my family as well.

- **Mentor:** My mentee gets asked to serve on many committees. She needs to be careful not to get distracted from her academic pursuits, but I know she feels a commitment to enhancing diversity— how do I talk to her about those choices?

Working through challenges in mentorship

- **Mentee’s first impression:** She seems proud of being tired, so I won’t even try to discuss my work–life with her.

- **Alternate approach:** She has mentored a lot of men and women, she had preschoolers once, and now has aging parents; maybe I can ask her what she has seen that works and doesn’t work.

- **Mentee’s first impression:** My mentor is supposed to be there for me but she’s always swamped; what’s the point of this relationship?

- **Alternate approach:** I understand she has lots of responsibilities. I could ask how I could make it easier for her to mentor me or give her permission to back out if that’s more practical.

# Mentorship Malpractice (Active)
*(Chopra, Edelson, Saint, JAMA 2016)*

<table>
<thead>
<tr>
<th>Phenotype</th>
<th>Description</th>
<th>Complicit Mentee Acts</th>
<th>Potential Countermeasures</th>
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</thead>
<tbody>
<tr>
<td>The Exploiter</td>
<td>Thrusts low-yield activities on mentees, justifying this as “the price of mentorship” or “a valuable learning experience.”</td>
<td>Willing to accept nonacademic chores that support only the mentor rather than him or herself.</td>
<td>Trial of firm boundary setting, use of additional mentors to evaluate requests. If or when mistrust ensues, exit the relationship.</td>
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<tr>
<td>The Possessor</td>
<td>Views other mentors as a threat, disparages potential co-mentors, or demeans the mentee for reaching out to others.</td>
<td>Fosters isolation by following mentor demands; misinterprets undivided attention by this mentor.</td>
<td>Insist on a mentorship committee; confront mentor with concerns regarding siloed approach.</td>
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<tr>
<td>The Hijacker</td>
<td>Takes hostage of mentee’s ideas, projects, or grants, labeling them as his or her own.</td>
<td>Sacrifices first-author positions on papers, names mentor as principal investigator on projects.</td>
<td>Quick and complete exit–there is no way for mentee to protect him or herself in this relationship.</td>
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## Mentorship Malpractice (Passive)
*(Chopra, Edelson, Saint, *JAMA* 2016)*

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<td>The Bottleneck</td>
<td>Preoccupied with his/her own priorities and lacks bandwidth to attend to mentees.</td>
<td>Allows the mentor to set timelines, facilitates behavior by staying silent or failing to get clarity or detail.</td>
<td>Set firm deadlines and be clear about what happens on those deadlines; articulate concern if the mentor does not prioritize.</td>
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<tr>
<td>The Country Clubber</td>
<td>Evades conflict and wants to be everybody’s friend—avoids engaging in difficult conversations on behalf of mentee.</td>
<td>Fails to ask the mentor to advocate effectively for the mentee.</td>
<td>Develop a mentorship team so that other mentors may engage in conflict on the mentee’s behalf. Approach conflict with focus on impact if not addressed.</td>
</tr>
<tr>
<td>The World Traveler</td>
<td>Highly sought after for meetings, talks, positions, etc., with little time for mentee on day-to-day basis.</td>
<td>Passively accepts lack of mentor availability, fails to connect via alternate methods of communication.</td>
<td>Establish a regular cadence of communication. Reserve time well in advance for meetings. Use alternate methods of communication.</td>
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## Mentee Missteps – (Conflict Averse)
*(Vaughn, Saint, Chopra, JAMA 2017)*

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<td><strong>The Over‐committer</strong></td>
<td>Lacks the ability to say no. Ends up overcommitted and underproducing.</td>
<td>Résumé filled with a host of committees, volunteer roles, etc., yet few resulting in academic products such as publications.</td>
<td>Learn to use your mentor or allocated effort as a reason for saying no.</td>
</tr>
<tr>
<td><strong>The Ghost</strong></td>
<td>Appears extremely enthusiastic and energetic, but then disappears without a trace and without notice.</td>
<td>Mentee may agree to assignments but then fail to follow up. When questions about project deadlines arise, the mentee avoids discussion.</td>
<td>When uninterested, suggest an alternative person who may be interested. Address issues early. To reduce anxiety, prepare a planned solution.</td>
</tr>
<tr>
<td><strong>The Doormat</strong></td>
<td>Mentee is on the receiving end of a manipulative mentor.</td>
<td>Mentee spends time on work unrelated to his or her own career. Review of mentee’s progress shows few first‐author papers in mentee’s field of interest.</td>
<td>Ask directly how new projects align with goals. Trial of setting goals and boundaries. Seek out new mentors.</td>
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# Mentee Missteps – (Confidence Lacking)
*(Vaughn, Saint, Chopra, JAMA 2017)*

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<td>The Vampire</td>
<td>Mentee requires constant attention and supervision, leaving mentors drained and empty.</td>
<td>Mentee requests approval or clarification for every step of a project, regardless of prior or similar discussions.</td>
<td>Recognize and embrace feelings of insecurity; talk with other trainees struggling with similar decisions. Before taking questions to a mentor, vet with a colleague.</td>
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<tr>
<td>The Lone Wolf</td>
<td>Assertive, self-motivated, and determined, but prefers working alone; feels mentors are a luxury.</td>
<td>Does not trust others or is afraid to ask for help. Does not work well as part of a team.</td>
<td>Realize that asking for help is critical for learning, not a sign of weakness. Appreciate that working with a team is a key skill for success.</td>
</tr>
<tr>
<td>The Backstabber</td>
<td>When this mentee fails, s/he makes assigns blame to others rather personal missteps.</td>
<td>People who work with this mentee once often don’t want to do so again. Has difficulty accepting responsibility.</td>
<td>Reframe mistakes as a learning opportunity. Make giving credit and accepting responsibility a daily goal.</td>
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Alternate approach to mentoring challenges

- Taxonomy of “mentor malpractice” and “mentee missteps” focuses on labeling and categorizing people

- But focusing exclusively on people/positions rather than interests/concerns is likely to worsen disagreement

- Goal should be to improve communication and mutual understanding plus modify problematic behaviors
Addressing challenges in mentor relationships

▪ When conflicts arise, parties should try to assume good intentions (“Why would someone I respect be acting this way?”)

▪ Be curious—go back to inquiry (“What is my mentor’s most pressing concern? What is s/he trying to accomplish”?)

▪ Balance this with advocacy (“This is my most pressing concern. This is what I am trying to accomplish. Tell me what doesn’t make sense.”)

▪ Acknowledge misunderstandings and tensions rather than ignoring them
Changing or ending mentor relationships

- Seek advice from career advisors (such as PCRF faculty) if you think you need to make a change
- Enter the process of changing with an attitude of respect for your mentor
- Except in a confidential setting, avoid saying anything to others that would embarrass you if repeated to the mentor
- Communicate changes in terms of change in involvement in projects or meetings rather than rejection of people
What is an Individual Development Plan (IDP)?

- Written, structured career planning tool
- Requires an answer two important questions:
  - Where am I headed with my career?
  - What will I do in the next [year] to get there?
- Provides structure for conversations with mentors
- Associated with greater satisfaction, fewer mentor conflicts, and more publications/grants
Why should you create (and share) an IDP?

- Enables you to assess your current skills and abilities as a junior researcher
- Gives you an opportunity to celebrate your accomplishments (small and large)
- Forces you to set short-term and longer-term research and career goals
- Facilitates communication with mentors and helps mentors give more useful advice
An IDP is a written product

- Written/printed/electronic document or worksheet
- Required of trainees in many training programs
- Formal versions for career development awards

An IDP is also a process

- Purposeful goal setting activity by the mentee
- Followed by constructive feedback from mentor
- Iterative, repetitive process of IDP refinement
How do I get mileage out of an IDP?
Part 1: Research-In-Progress Table

<table>
<thead>
<tr>
<th>IDEA RESEARCH QUESTION</th>
<th>PROPOSAL (CHR; funding)</th>
<th>DATA COLLECTION</th>
<th>DATA ANALYSIS &amp; SYNTHESIS</th>
<th>PRESENTATIONS &amp; PRODUCTS eg, papers</th>
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- Are there any barriers that are preventing the timely transition from one stage to the next?
- For stages “in progress”, provide an estimated date of completion or resolution
Part 2: Individual Development Plan

Individual Development Plan

Scholar’s Name:
Date of Report:
Mentors’ Names:

I. Scientific / clinical goal(s):
   A. Objective:
      i. Education/training
      
      ii. Research activities
      
      iii. Products (include dates)

II. Career / professional goal(s):
   A. Objective:
      i. Education/training
      
      ii. Other related career activities
      
      iii. Products (include dates)
Other IDP examples
Angela DePace’s group at Harvard
Strategies for using an IDP

- Focus on the process more than the product
- Establish and scheduling for reviewing your IDP
- In meetings, first explain your IDP to your mentor(s)
- Then solicit constructive feedback on improving your IDP
- Get mentor buy-in on their contributions to your IDP goals
- Prepare to modify your IDP over time
Four steps for using an IDP

1. **Assessment** – looking back and taking stock
   - What have I accomplished since my last IDP?
   - How have my skills, values, interests changed?

2. **Career exploration**
   - What is my post-training career goal?

3. **Goal setting**
   - What will I accomplish in the next year?
     - To finish my training stage
     - To reach my post-training career goal?

4. **Mentor and Mentee – Implementation**
   - How will my mentors help me accomplish my goals?