

Original Publication

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# Optimizing Your Mentoring Relationship: A Toolkit for Mentors and Mentees

Megan Aylor, MD\*, Mario Cruz, MD, Aditee Narayan, MD, MPH, Col. Clifton Yu, MD, Joseph Lopreiato, MD, MPH, Keith J. Mann, MD, Rhonda Graves Acholonu, MD, Teri Lee Turner, MD, MPH, Janet R. Serwint, MD, Theodore Charles Sectish, MD, Marsha S. Anderson, MD, Nancy D. Spector, MD

\*Corresponding author: [aylorm@ohsu.edu](mailto:aylorm@ohsu.edu)

**Citation:** Aylor M, Cruz M, Narayan A, et al. Optimizing your mentoring relationship: a toolkit for mentors and mentees. *MedEdPORTAL*. 2016;12:10459. [https://doi.org/10.15766/mep\\_2374-8265.10459](https://doi.org/10.15766/mep_2374-8265.10459)

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## Abstract

**Introduction:** Mentorship is a vital component of academic and professional development. Mentees report positive impacts from mentorship programs, yet institutions and societies may struggle to meet their mentees' needs due to factors such as mentor fatigue and lack of mentor training. To address this in our own professional society, the Association of Pediatric Program Directors, we developed a mentor toolkit in order to utilize a variety of mentoring models, provide faculty development for midlevel mentors, and offer guidance to mentees. **Methods:** Most of these tools were designed to be administered in an interactive format such as a workshop or seminar with think-pair-share opportunities. The toolkit begins by providing a definition of *mentoring* and reinforcing the benefits and the characteristics of effective mentoring relationships. Next, we discuss the important role that mentees have in creating and maintaining effective mentoring relationships (i.e., mentee-driven mentoring). We then introduce a mentoring mosaic activity designed to help mentees examine their professional network and think about how they might expand it to fulfill the spectrum of their mentoring needs. Next, we present guidelines for the implementation of four mentoring models that can be used within one's institution: traditional dyadic mentoring, peer group mentoring, meet the professor mentoring, and speed mentoring. We then provide tools that can be used to help facilitate effective mentoring development. **Results:** This toolkit has successfully served as a self-guided resource at national meetings for many years, garnering positive feedback from mentors and mentees alike. **Discussion:** The principles and methods are easily generalizable and may be used to guide mentorship programs within institutional and professional societies, as well as to assist mentors and mentees in optimizing their individual mentoring relationships.

## Keywords

Mentors, Mentoring, Professional Development, Mentee

## Educational Objectives

After reviewing this toolkit, participants will be able to:

1. Identify the skills and attributes of effective mentors and successful mentees.
2. Articulate the benefits of mentoring for both mentors and mentees.
3. Participate in a variety of different mentoring models.
4. Provide effective feedback on mentee strengths and areas for growth and development, and make progress towards goals.
5. Perform a reflective audit of their mentoring relationships.

## Introduction

Mentorship is an important part of academic and professional advancement.<sup>1-5</sup> Mentees report positive impacts on personal and professional development, yet mentor fatigue and lack of mentor training may limit mentor capacity.<sup>6-9</sup> Academic institutions as well as professional societies should be prepared to meet the needs of mentors and mentees while being mindful of the risk of pitfalls and mentor limitations.

## Appendices

- A. Optimizing Your Mentoring Relationship - A Toolkit for Mentors & Mentees.pdf
- B. Meet the Professor Faculty Discussion Guide.pdf

*All appendices are peer reviewed as integral parts of the Original Publication.*

This toolkit is intended to provide guidance on different mentoring models, allowing groups to train mentors, empower mentees, and optimize their mentorship capacity. This toolkit has served as a resource to guide our mentoring program in our own organization for many years.<sup>10-14</sup>

The mentoring toolkit is intended to be a self-guided resource. The subsections describe various mentoring models, which can be adapted to suit the needs of your mentees and optimize the capacity of your potential mentors. This toolkit is intended for use by leaders of institutional and professional society-based faculty development and mentorship programs.

Individual components of this toolkit, including the mentoring mosaic, professional development planning tool, guidelines for dyadic mentoring, and meet the professor, speed mentoring, and facilitated peer mentoring sessions, have been used for faculty development in at least 10 different Association of Pediatric Program Directors (APPD) national meetings, as well as at Pediatric Academic Societies meetings since 2006 and, more recently, at the Pediatric Educational Excellence Across the Continuum meeting. In addition, we have used individual components as parts of workshops delivered at our home institutions and during visiting professorships. Other components, such as professional development planning<sup>15</sup> and mentee-driven mentoring,<sup>16</sup> referenced in this toolkit have been previously published on MedEdPORTAL. These previously published resources provide guidance on goal setting and mentee skill development. Additional MedEdPORTAL mentoring publications have provided guidance on long-distance mentoring relationships,<sup>17</sup> skills building for mentors,<sup>18</sup> facilitated peer mentoring models,<sup>19</sup> and effective networking skills.<sup>20</sup> However, our organization sought a comprehensive resource to guide our mentorship program. This toolkit was thus developed as a stand-alone resource to guide the mentorship program within our organization.

## Methods

### Toolkit Development and Content

The toolkit was originally created to complement the development of the APPD's mentoring program. The original mentoring model included traditional mentor/mentee dyads as well as facilitated peer group mentoring consisting of one senior mentor/facilitator assigned to a group of six junior participants. Over time recruiting mentors, the APPD Mentoring Subcommittee recognized that mentors—even those who were very accomplished—were often uncomfortable serving as mentors. Many reported that had never received adequate mentoring themselves. Others relayed that they had never received formal training and were not confident in their skills. In addition, the APPD was faced with mentor fatigue. Many junior and midlevel members sought mentorship from a limited pool of senior mentors. The APPD Mentoring Subcommittee sought to develop more mentor capacity through recruitment and training of more mentors to meet the growing need. These tools were created to help support the development of mentoring skills and to enhance the mentoring process. As members of the APPD Mentoring Subcommittee presented workshops, additional tools were developed. Though this toolkit was developed for the APPD membership, we believe the principles and skills are widely applicable to any audience of medical educators.

The toolkit begins by providing a definition of *mentoring* and reinforcing the benefits of effective mentoring relationships. The roles that a mentor can play are explained (e.g., coach, confidant, advisor, sponsor, etc.), and the characteristics of effective mentoring relationships are further delineated. Next, we discuss the important role that mentees have in creating and maintaining effective mentoring relationships (i.e., mentee-driven mentoring). We then introduce a mentoring mosaic activity designed to help mentees examine their professional network and think about how they might expand it to fulfill the spectrum of their mentoring needs. Next, we present guidelines for the implementation of four mentoring models that can be used within one's institution: traditional dyadic mentoring, peer group mentoring, meet the professor mentoring, and speed mentoring. We then provide tools that can be used to help facilitate effective mentoring development. These include advice on preparing and maintaining one's CV as well as guidance on professional development planning. We emphasize that mentees should complete both of

these items prior to meeting with a mentor. In order to optimize mentoring relationships, we present tools that can be used to audit one's mentoring relationship from both the mentor's and the mentee's perspective. Recognizing that the delivery of feedback is critical to an effective ongoing mentoring relationship, we provide guidance for mentors and mentees about how to approach this issue. Lastly, we provide a reference list of articles relevant to mentorship for users of this resource.

#### Practical Implementation

Most of these tools were designed to be administered in an interactive format such as a workshop or seminar. Typically, the tools work best if the session offers *think-pair-share* opportunities whereby participants think and reflect individually to complete a task, pair up with another participant to discuss their thoughts, and then share their findings with the larger group. In order to use this toolkit optimally, it is important for leaders to provide clear directions to participants on how to use the tools. Many of these tools and organizational frameworks require advanced preparation time in order to be utilized most effectively, for example, recruiting mentors and setting up appropriate spaces. Proper planning, especially with time-limited experiences such as speed mentoring, is essential. The most effective sessions require self-reflection on the part of mentees; therefore, planning time for self-reflection prior to the session or at the beginning of the session is optimal.

#### Recruitment and Selection of Mentors and Mentees/Participants

Effective implementation requires the successful recruitment and selection of mentors and mentees. Mentors were recruited by the APPD Mentorship Committee based on the following criteria: at least 5 years of experience in their educator role, midcareer or senior faculty status, and current or past educational leadership role regionally or nationally. Specific APPD leaders were targeted, including board members, leaders of APPD committees and task forces, and executive committee members. The majority of mentors solicited agreed to attend the session if they were otherwise planning to attend the APPD Meeting. Mentors were asked to rank their comfort level with mentoring in the following areas: educational scholarship, evaluation/assessment, curriculum, professional development, quality improvement, global health, program management, and learning technology (topics are aligned with APPD organizational structure). Mentors were matched with mentees and/or topics based on their self-identified areas of comfort, as well as national/regional recognition of their expertise in a given area. Mentors were provided with instructions for the sessions via email prior to participation. The same process was used for the various session formats that were utilized.

#### Results

This toolkit has been utilized for multiple different mentoring sessions at national meetings predominantly targeting pediatric educators, including program directors, associate program directors, fellowship directors, and pediatric chief residents. The majority of participants were junior to early midcareer educators. They were asked to rank their personal needs for mentoring in the following areas: educational scholarship, evaluation/assessment, curriculum, professional development, quality improvement, global health, program management, and learning technology—topics that are specifically aligned with APPD organizational structure. Participants reported a wide variety of mentoring needs prior to the session, including overall career mentoring, program management, educational scholarship, and developing new curricula/evaluations. Most participants reported multiple mentoring needs. Nearly all the participants lacked any formal educational leadership roles either at APPD or in other national venues.

Components, including professional development planning, dyadic mentoring guidelines, meet the professor guidelines, and speed mentoring guidelines, have been used independently to prepare sessions at the spring and fall APPD mentoring sessions for the past 5 years, and the resource has been provided in its entirety as a stand-alone resource for mentors/mentees during the biannual mentoring sessions. Session formats have varied from traditional dyadic pairings to speed mentoring formats to meet the professor sessions.

Participants and mentors were consistently positive regarding the various mentoring sessions conducted using components of the toolkit. Ninety-seven percent of participants responding to the postsession survey of the APPD Fall Meeting over the past 3 years (2013-2015) have described the session as helpful or very helpful (number of respondents = 77). In 2013, 101 program directors, associate program directors, fellowship directors, and other key personnel were registered for the APPD Fall Meeting mentoring session. In the postsession survey, 96% of respondents indicated that the session was helpful or very helpful (number of respondents = 25). One respondent commented, “I really enjoyed the mentoring lunch—that was the most useful session for me during the conference.” One hundred thirty-six program directors and associate program directors registered for the 2014 APPD Fall Meeting. Mentoring registrants were not identified separately. One hundred percent of survey respondents indicated that the session was helpful or very helpful (number of respondents = 25). A respondent wrote, “I always enjoy the mentoring sessions at the APPD meetings. Wish there was more time for this!” One hundred thirty program directors and associate program directors registered for the 2015 APPD Fall Meeting. Mentoring registrants were not identified separately. Ninety-six percent of survey respondents found the session to be helpful or very helpful (number of respondents = 27).

During the past two APPD Spring Meetings in 2015 and 2016, the toolkit has been utilized as a guide to prepare for the speed mentoring session. Registration was capped at 30 mentees each year and filled very quickly, with a long waiting list of mentees hoping to secure a place at the session.

Nine mentees completed the evaluation for the Spring 2015 session. All respondents rated the session as excellent, the highest designation, across all categories, including overall session, content, organization, presentation, use of time, and handouts/audiovisuals. Comments included the following: “This was by far the most helpful session to me at APPD. Meeting with more senior APDs/PDs was a great experience. I received great guidance on how to further my career as an educator.” The Spring 2016 evaluations were completed by six mentees. All respondents recommended that the session be repeated.

Constructive feedback was garnered from all available evaluations and used to inform iterative changes to the mentoring toolkit after each session. For example, the format of the Fall Meeting informed the need for a more flexible mentoring program. The Fall Meeting primarily attracts newer participants and fewer senior members. In order to maximize the impact of the senior members, the meet the professor format was developed whereby senior mentors would meet with up to eight to 10 participants at a time. In addition, the senior members were paired with more junior, but still experienced, members who also served as professors. This arrangement allowed the junior members to learn how to serve as a professor, thereby expanding the pool of available mentors. It also allowed us to serve the needs of more participants compared to dyadic or speed mentoring formats, which require a higher mentor-to-mentee ratio. In addition, feedback from the 2016 Spring Meeting revealed the need for more guidance to mentors in working with mentees. The speed mentoring session instructions were adapted to address this need.

The Associate Program Director Executive Committee has requested that once this resource is finalized and published on MedEdPORTAL, it be included in the *Associate Program Director (APD) Handbook*, a nationally recognized professional development resource for associate program directors.

## Discussion

The mentoring toolkit was developed to meet the significant mentoring needs of educators at APPD. We are pleased that this toolkit has become a welcome resource for mentors and mentees alike. It provides helpful tools for guiding mentoring relationships and resources to assist in personal development planning. Likewise, the toolkit has enabled the developers of mentorship programs to optimize their mentors, empowering midlevel mentors by developing their mentorship skills to mentor junior mentees. The toolkit has proven easy to use and functions well as a stand-alone document for mentors and

mentees. Given their use of general principles, the mentoring methods and tools are easily generalizable to local institutions or to other national organizations outside of APPD. The toolkit can be used by other medical educators beyond the field of pediatrics. Although developed with educators in mind, the toolkit can be used to support mentorship for noneducator faculty.

Our greatest challenge remains the time required of mentors as well as program leaders to organize and invest in mentorship programs. A limited number of senior mentors can often lead to significant use of senior mentor skills and increase the risk of burnout. The tools in this toolkit have helped mitigate this problem by providing resources and guidance to expand an organization's mentor pool, providing alternative mentoring models that require fewer mentors, and appropriately preparing mentees to take an active role in their mentorship experience. Additionally, this toolkit has served as a resource for more-junior faculty who are interested in growing their mentoring skills, thereby improving the mentoring workforce. Adequate planning is also a challenge for organizing mentoring activities. Again, this toolkit has helped to address this challenge as it provides a consolidated repository of resources for leaders to draw upon as they plan their sessions.

Lessons learned include the need to work with organizational leadership to identify mentorship as key to a strategic plan. This dialogue will help identify organizational resources to support use of the toolkit in promoting mentorship. For example, mentees can be recognized as organizational contributors based on their participation in mentoring sessions. Conference time and resources can be allotted to support mentoring programs. In addition, it is more effective when individuals first identify their own mentoring and professional development needs and then use the relevant components of the toolkit to address their needs. The toolkit is intended to be adapted by individuals, programs, or institutions using the elements that align best with their identified needs.

This toolkit covers a number of mentoring needs and continues to be a resource within our association. Future plans include further development of the toolkit; for example, not all mentoring relationships are successful, and ending a mentoring relationship is a topic that warrants attention. Mentor development, particularly the development of midlevel mentors, is an ongoing need in our organization and one that may benefit from creative solutions, such as the use of technology for remote faculty development sessions. These topics are not included in this toolkit and remain opportunities for future development. In addition, the results of our mentorship programming have been limited to satisfaction data. This has shaped the development of the resource; however, more robust assessment of outcomes beyond satisfaction may help inform the effectiveness of mentoring efforts. This remains an opportunity for future investigation.

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**Megan Aylor, MD:** Clinical Associate Professor, Department of Pediatrics, Oregon Health & Science University School of Medicine

**Mario Cruz, MD:** Community Pediatrician, St. Christopher's Hospital for Children; Assistant Professor, Department of Pediatrics, St. Christopher's Hospital for Children

**Aditee Narayan, MD, MPH:** Associate Professor, Department of Pediatrics, Duke University Medical Center

**Col. Clifton Yu, MD:** Director of Graduate Medical Education, Walter Reed National Military Medical Center; Associate Professor of Pediatrics, Uniformed Services University of the Health Sciences

**Joseph Lopreiato, MD, MPH:** Professor, Department of Pediatrics and Medicine, Uniformed Services University of the Health Sciences

**Keith J. Mann, MD:** Professor, Department of Pediatrics, University of Missouri-Kansas City School of Medicine; Professor, Department of Pediatrics, Children's Mercy Hospital

**Rhonda Graves Acholonu, MD:** Clinical Assistant Professor, Department of Pediatrics, New York University School of Medicine

**Teri Lee Turner, MD, MPH:** Associate Professor, Department of Pediatrics, Baylor College of Medicine

**Janet R. Serwint, MD:** Professor, Department of Pediatrics, Johns Hopkins University School of Medicine

**Theodore Charles Sectish, MD:** Professor, Department of Medicine, Boston Children's Hospital

**Marsha S. Anderson, MD:** Professor, Department of Pediatrics, University of Colorado School of Medicine

**Nancy D. Spector, MD:** Professor, Department of Pediatrics, Drexel University College of Medicine; Professor, Department of Pediatrics, St. Christopher's Hospital for Children

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#### Disclosures

None to report.

#### Funding/Support

None to report.

#### Ethical Approval

Reported as not applicable.

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**Received:** March 2, 2016 | **Accepted:** August 25, 2016 | **Published:** September 23, 2016