

# Mentorship Policy





FACULTY OF | UNIVERSITY OF  
MEDICINE | CALGARY

M E N T O R S H I P P O L I C Y

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## I: Philosophy and Values

*“As people begin their journeys in their professions, they need to understand the ropes that lead to success and promotion in their career. Related to this is to find one’s niche, develop one’s skills, continue education, and understand the politics and climate of the work place. Where does one go for guidance? Finding one’s way through these can take place through a mentoring relationship.”<sup>1</sup>*

The success of any academic enterprise relies critically upon its ability to attract, recruit, train and retain the best qualified individuals. While most institutes can muster resources to recruit bright young minds, their continued success depends upon meaningful mentorship of junior staff.

The quality and the extent of this mentorship is not only essential for institutional excellence but should also be considered pivotal for the career development of junior faculty members. Beyond the need for salary support and start up funds for all junior faculty members, the academic institute must also provide a highly comprehensive mentorship policy that will foster excellence in research, education and service to the community. The relationship between the faculty, the mentor and the protégé will enhance academic excellence for the faculty and promote a rewarding lifelong experience for the other two members.

*“I have enjoyed the privilege, as a university teacher, of being in a position to influence the thought of many hundreds of young people and in them and in their lives I shall continue to live vicariously for a while. All the things I care for will continue for they will be served by those who come after me. I find great pleasure in the thought that those who stand on my shoulders will see much farther than I did in my time. What more could any (person) want?”<sup>2</sup>*

Mentoring a junior faculty member during the first five to ten years of academic life through the tangled academic underbrush in a highly challenging, funding environment, can be an exceptionally rewarding and stimulating experience.

An effective mentor is a special person whose professional and academic career serves as a model for those starting out as Assistant Professors. Given that there is no specific training for becoming a professor other than observation, mentors play an important role in socialization.

Bland et al. identified three realms in which junior faculty need to be socialized: 1) adopting academic values, 2) managing an academic career, and 3) establishing and maintaining a productive network of colleagues. A mentor should not, however, be viewed as all-knowing, but rather a caring colleague – who has “been there” – and takes tremendous pride in furthering the careers of his/her junior faculty members.<sup>3</sup>

**“An expert is a person who has made all the mistakes, which can be made, in a very narrow field.”**

(Edward Feeler)



## II: Terms of Reference

### A) Mentorship Director

The Mentorship Director will:

- Have a 0.50 FTE position dedicated towards the implementation of the mentorship policy. The Director will also have access to essential financial resources (administrative support etc.) to implement all aspects of the mentorship program throughout the Faculty of Medicine.
- Have an independent office structure and report to the Vice Dean. He/she will also be supported by a full-time Administrative Assistant/Secretary.
- Raise faculty-wide awareness (clinical and basic departments) with respect to various policies and criteria for promotion and tenure.
- Identify the mentor and the protégé's needs on a case-by-case basis. In consultation with the Department Head(s) and the Institute Director, the Mentorship Director may either recommend a single mentor or a team-based mentorship approach.
- Coordinate meetings and maintain records of at least two meetings each year between the mentor and the protégé.
- Foster effective mentorship throughout the faculty (i.e. seminars, symposia, workshops, etc.).
- Be available for conflict resolution.
- Provide a written recommendation to the Department Head and/or Institute Director for an annual Faculty Mentorship Award.

### B) The Mentor-Protégé Relationship

- The role of the faculty mentor is to guide and support the professional development of the newly appointed faculty member (protégé).
- On a regular basis - at least every six months - the mentor and the protégé will meet to discuss career development. During the first six months, mentors and protégés should meet more than once to ground the relationship.
- These discussions will be conducted in confidence. Their content may only be discussed with the Mentorship Program Director, Division Head, the Department Head, the Institute Director, or with any other person, with the mutual and written consent of both the mentor and the protégé.

- The mentor will confirm that discussions concerning professional development have taken place by submitting a report form to the Mentorship Director. The mentor or protégé may bring any concerns or suggestions to the attention of the Mentorship Director, Department Head and/or Institute Director when mutually agreed to do so.
- The mentor's qualifications should include a well-established track record in academics, teaching and/or research. The mentor should not normally be the Department Head, Division Head, or the Institute Director. Under circumstances when the Department Head appears to be the most suitable "mentor" for a protégé, he/she should be allowed to step up as the mentor. However, in smaller departments, the Division Head's role may be deemed appropriate.
- The pairing of mentors and protégés is the responsibility of the Mentorship Director who will consult with the Division Head, the Department Head, the Institute Director, the faculty mentor and the protégé. The Mentorship Director will meet with the protégé in person before formalizing the pairing and subsequently, if necessary, to address any issues of concern that might arise.
- The term of the mentor will initially be for one year. This will subsequently be renewed as per mutual consent between the mentor and protégé. The faculty member will have an identified mentor until promotion to Associate Professor. Mentorship in the arena of research scholarship such as salary awards including the Alberta Heritage Foundation for Medical Research (AHFMR) and operating grants will, however, continue as deemed appropriate by the Department Head and Institute Director.
- In research scholarship, the Institute Director will take on a much greater role and will be the main driver and coordinator of the internal peer review process. The Department Head, the Director and the mentor should also be kept well-informed throughout the process.
- In some instances, a team-based mentorship approach may be deemed essential to enable a full scope of mentorship.

### III: Mentorship Program Responsibilities

#### A) Academic Qualifications of the Mentor

1. Whenever possible the mentor should be an Associate or Full Professor, on the academic (FTE) track, or an Associate Clinical or Clinical Professor on the Clinical (FTE) track.
2. Whenever possible the mentor should be from the same division or department as the protégé. (Division holds true for clinical departments).
3. The mentor should be interested in, and committed to, the ideals of the mentorship process.
4. The mentor should be willing and able to provide constructive criticism.
5. The mentor should have a thorough understanding of the Department, the Institute and the Faculty organization, academic procedures and sources of external academic support.
6. The mentor should be approachable, empathetic, non-judgmental and supportive.

#### B) Expectations of the Mentor

1. To meet with the protégé at least twice per year to discuss career goals, concerns and progress. To be available to the protégé on an ad hoc basis for issues or concerns that may arise.
2. To submit a completed report form to the Mentorship Director, Department Head and the Institute Director following each meeting.
3. To maintain a written record of the meeting's identified goals, concerns and achievements.
4. To maintain strict confidentiality regarding the information that is shared.
5. With the protégé's permission, advocate on their behalf.

If the above expectations are not met, or the relationship is unfulfilling on either side, reassignment will occur.

#### C) Protégé Responsibilities in the Mentorship Program

1. To accept responsibility for career development.
2. To attend meetings as set by the mentor.
3. To set goals and timetables for completion of projects and invite feedback on progress towards them. These action plans are to be reviewed at each meeting.
4. To be receptive to suggestions, advice and feedback.
5. To listen to and ask questions of the mentor.
6. To be open about thoughts and feelings, provide feedback on what works and what doesn't work.
7. To conduct honest self-assessment regularly.
8. To share shortcomings in perceived areas of improvement.
9. To identify barriers to goal achievement and to suggest potential solutions.
10. To maintain the confidentiality of the relationship.
11. To commit time and energy to the process.



## IV: Roles of the Mentor



1. Assist protégé in adapting to professional demands of an academic career in medicine.
2. Provide networking opportunities and introductions to key institutional leaders.
3. Offer coaching in the enhancement of problem solving and leadership skills.
4. Assist in focusing goals and timing of career development plans; ensure adherence to job description. Assist with developing short and long-term action plans and reviewing these at each meeting.
5. Provide appraisal and constructive criticism of career decisions.
6. Evaluate curriculum vitae (CV) of protégé and ensure CV format meets faculty regulations.
7. Assist as required with academic and clinical bureaucracies.
8. Act as role model of professional competence and behaviour.
9. Challenge protégé to accept new responsibilities within the job description.
10. Aid in preparing for academic watersheds such as promotion and tenure.
11. Review grant applications and manuscripts when requested.
12. Advocate for adequate time for the protégé to meet his/her job description.
13. Accept regular evaluations/feedback on the value of the relationship from the protégé and from the career development team.
14. Be a “safe haven” where frustrations, doubts and concerns can be voiced without fear of reprisal. Provide friendship and counselling.
15. Above all, have fun and create an enjoyable relationship.

Perhaps the most important role for the mentor is listening. To listen, the mentor needs to create the atmosphere in which the protégé feels comfortable talking about anything that affects his/her career. One of the ways to create this environment is to meet frequently in a variety of settings.

The approach to creating a bond with the protégé is dependent upon the personalities of the individuals and initially upon the personal preferences of the mentor. Some ideas include:

1. A monthly lunch at a restaurant near the University. (Funding to be provided through the Mentorship Program).
2. Introducing the protégé (and his/her family) to some of the activities available to them in Calgary.
3. Sharing some of your experiences as a young academic, particularly those you would not like to see your protégé repeat. Perhaps share article or grant reviews that were not initially successful.
4. If you participate in some regular exercise at the Faculty of Medicine's fitness centre, or elsewhere, invite your protégé to join you. This will further facilitate communication.
5. Identify your protégé's strengths, expertise and interests and express an interest in learning from them. The literature stresses that successful mentoring is the result of two-way learning and support.
6. Community – if your protégé is from outside Calgary, try to introduce them to the cultural, artistic and sporting activities of the city and its surroundings.
7. Politics – insight into Faculty, Department, University and the Calgary/Alberta Health Regional politics will foster awareness and a sense of belonging.
8. Make them aware of the Faculty Association and its role vis-à-vis the promotion and tenure issues.
9. Raise awareness about various committees within the faculty and the campus and the workload associated with them. Encourage participation, as service plays an important role in reaching requirements for promotion and tenure.
10. Instill political correctness, professional collegiality and a sense of belonging.
11. Traditionally, soft money and externally supported faculty (AHFMR, etc.) have been discouraged to get involved in the educational and service mission of the faculty. Because the landscape for external funding is changing rapidly, the faculty is more likely to pick up those junior faculty members who have made significant contributions to its educational and service mission.
12. Encourage your protégé to invite leaders in his/her respective field to Calgary and assist them in putting together an AHFMR visiting lectureship application.
13. If you are hosting an established visitor for a seminar series or clinical rounds, make sure that your protégé has the opportunity to meet with him/her or have them take the speaker out for lunch/dinner.
14. You are the role model for your protégé – make sure to avoid negative comments about your colleagues and the institute.
15. Seek the opportunities for your protégé to get invited to other institutes and to serve on grant panels etc.
16. Encourage awareness of various funding opportunities both internally and externally. The processes of having ethics policies and grant applications approved internally are complex and time consuming. Help familiarize them with various procedures and deadlines and assist if necessary.
17. Facilitate collaborations with those who might share common interests with your protégé and the techniques available within your institute. Introduce them to various core facility directors and the animal care committee director if appropriate.
18. Encourage the protégé to attend Faculty Council meetings on a regular basis.

## V: Objectives of Initial Meetings

### A) Mentors should review the criteria for career advancement and identify short-term and long-term goals to meet those requirements.

The mentor should schedule a meeting with the protégé soon after the protégé starts his or her position—no later than two months in. At least two meetings every six months between mentor and protégé are recommended.

#### Setting Career Goals:

An excellent way to begin a good mentorship relationship is to ask the protégé to explain to you her or his long-term, midterm and immediate career goals. If no specific goals have been identified (i.e. “to publish two papers in high impact journals within the first three years of my appointment”), help the protégé to work on this. Specific goals are extremely important.

The mentor and protégé should review the guidelines for promotion and tenure together on an annual basis, because these may change subtly from year to year. The following list provides a brief summary of the evaluation criteria for promotion and tenure.

#### Promotion and Tenure Preparation:

- The ability to successfully request letters of recommendation from scientists at peer institutions.
- Preparing well in advance in order to meet important deadlines.
- Teaching evaluations
- Service contributions
- Documentation
- National and international exposure (examples of relevant experiences)
- Manuscript reviews
- Grant reviews
- Editorial boards
- Invited seminars
- Scientific meetings
- Hosting seminar speakers in field

### B) Setting goals for the clinical scientist and the research scientist

- Determine a timeline to establish research projects and pursue funding.
- Consider the eventual number of personnel required to sustain the desired size of the protégé’s research program.
- Review procedures for hiring technical personnel.
- Discuss how to attract and keep graduate students including appropriate supervisory committee membership and timelines for graduate student development through training programs. This is important because many junior faculty members have little experience in training graduate students.
- Evaluate publications to date and experimental plan.
- Review protocol approvals for biohazard, radiation safety, ethics, etc.
- Identify grant deadlines and mechanisms for internal vetting of initial proposals. Determine internal reviewers – one major, several minor reviewers; major reviewer need not be the mentor.
- Schedule deadlines to avoid last minute effort and to provide sufficient time for review.
- Schedule an oral presentation of work in progress at least three months prior to grant deadline.
- Review strategies to keep abreast of the latest research in the protégé’s field: (e.g. PubMed searches, library visits, e-mailing former contacts).
- Identify suitable teaching assignments. Review appropriate teaching topics as required by Faculty Development Program to improve teaching ability and to make preparation of topics more efficient.
- Encourage protégé to sit on graduate student committees, departmental research committees and search committees. These all provide important insights into the development of



research programs, and are appropriate even for new faculty. Curriculum planning committees and strategic planning committees, admission committees, institutional review committees, and other committees requiring extensive time commitments, should be the responsibility of established faculty and not involve junior faculty. The topics under discussion typically require multiple meetings to resolve, and can absorb considerable amounts of a junior investigator's time.

- Encourage attendance at departmental and institute retreats. If constructively planned, these annual activities are important to the research careers of all faculty members.
- Encourage protégés to attend department and/or division meetings.
- Review time management strategies.
- Provide directions to the protégé's work, to avoid falling into patterns of short-term immediacy in order to satisfy deadlines.
- Encourage manuscript writing (organization of ideas, management of writing time, selection of appropriate journals, and evaluation of competition in the field).
- Identify strategies for gaining local and national exposure.
- Mentors should encourage junior faculty to seize opportunities for manuscript and grant reviewing.
- Encourage presentation at appropriate national and international scientific meetings.
- Encourage hosting seminar speakers and meetings with other speakers.
- Discuss expanding the laboratory and the recruitment of postdoctoral fellows.

### **C) Setting goals for the clinician-educators, clinical specialists and innovators**

- The junior faculty members should perform a critical self-assessment prior to their first meeting with the mentor. They should identify their career goals, and as honestly as possible,

analyze their current progress toward them. How is the protégé using their time? How much of their daily activities further their academic goals and how much detracts from them? How could their time be utilized more efficiently?

- The protégé should identify academic objectives and assign priority. Objectives for the clinician-educator include researching ways to enhance teaching skills, and develop, assess and revise the teaching curriculum.
- The mentor should critically evaluate the protégé's assessment of career objectives. The mentor and protégé should reach a consensus on which career aspects need refining and the steps required to realize those objectives. These can include ways to improve time management, enhance negotiating skills, improve scholarly writing and presentation and identify funding opportunities, programs and grantsmanship.
- The mentor should review time management strategies.
- The mentor should provide advice on the steps to gain local, national and international recognition (publication, attendance at meetings, hosting visits from prominent academicians).
- The mentor should advise on suitable committees for junior faculty to sit on that increase local visibility and competence in areas pertinent to their career goals.
- The mentor should assist the protégé to identify specific educational projects, clinical trials, innovation strategies and research projects. The mentor should also identify potential collaborators and networking contacts.
- The mentor and protégé should agree on ways to assess and document those academic achievements relevant to the protégé's career goals.

## VI: Mentorship Awards

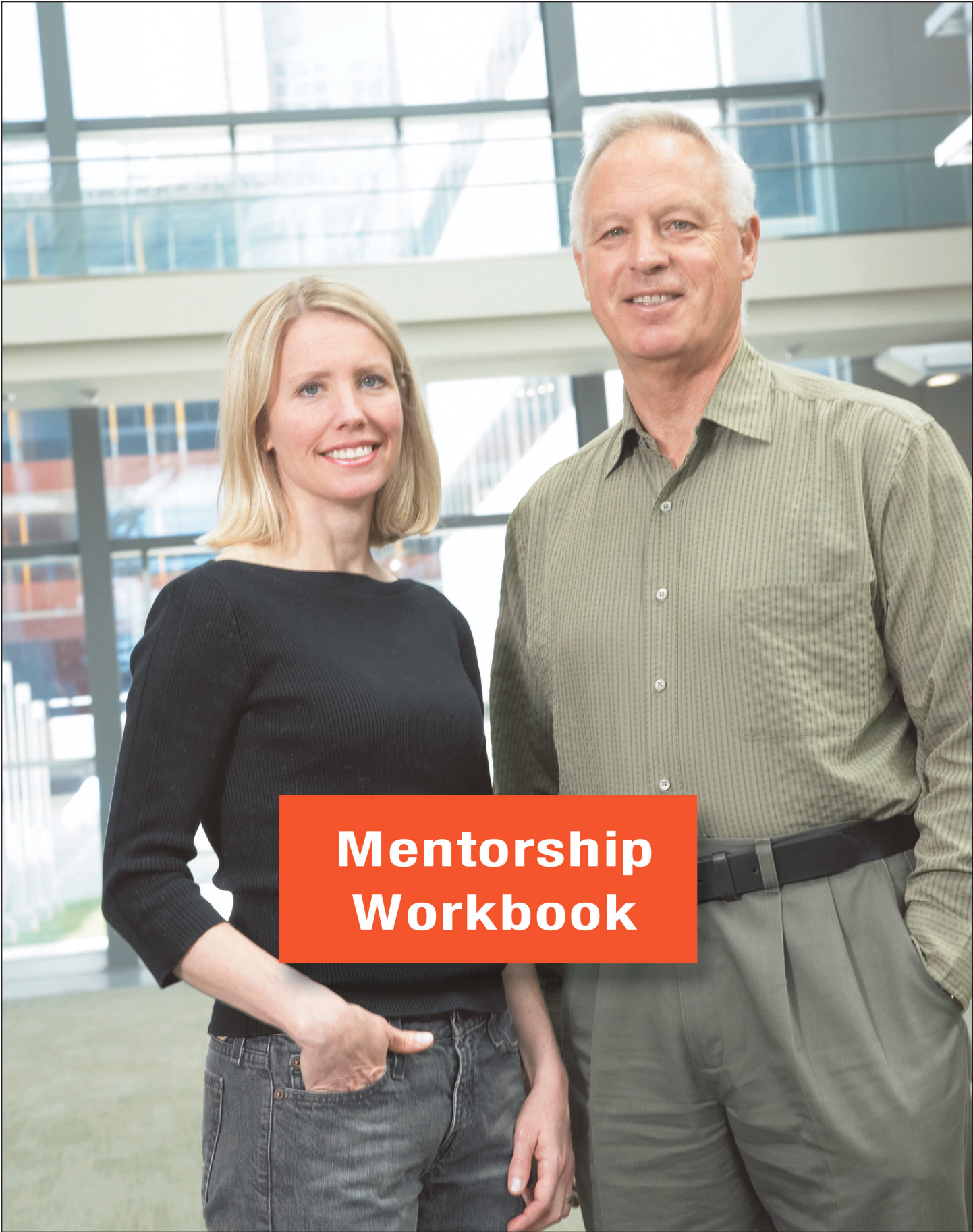


A faculty-wide mentorship award will acknowledge outstanding mentors annually. In addition to Faculty recognition in the form of a plaque, the nominating department (in consultation with the Mentorship Director and the Institute Director) will allocate an additional merit increment of 0.2 out of its merit pool. The best candidate selected by the Promotions Committee will receive an additional merit increment of 0.2 from the Faculty pool (total additional merit increment of 0.4). The time lines for these awards will be similar to other faculty-wide awards. Because the annual assessment process is now in a two-year cycle, the leadership forum may wish to award merit in two successive increments (0.2 for year one and 0.2 in year two) but the Promotions Committee will still select the awardees annually.

In addition, individual clinical departments, educational units and institutes are highly encouraged to acknowledge outstanding mentors within their respective programs. For instance, individual programs within institutes may select and reward their best mentors, which could then be put forward to its executive/research committee for an Institute-wide award. The executive committee may then select one or two mentors for an Excellence in Mentorship Award on an annual basis. These mentors may also have the opportunity to be nominated for the above-mentioned faculty-wide mentorship award.

### A) Criteria for the Mentorship Award<sup>4</sup>

1. A role model and nurturing guide, who inspires, supports and coaches personal and professional growth.
2. An individual committed to lifelong learning and sharing of new knowledge.
3. A leader defining the vision towards which an academic should aim for – challenging the protégé to excel.
4. An individual who contributes to career development within the faculty either via personal mentorship format or program development (educational/clinical), or research in faculty development.



**Mentorship  
Workbook**

C O N F I D E N T I A L

**MENTORSHIP WORKSHEET**

(Pages 1 to 4 to be maintained by the Mentorship Director, the mentor and protégé.

Page 5 to be signed and submitted to the Department Head, Division Head, and Institute Director).

Department of \_\_\_\_\_ , Faculty of Medicine, University of Calgary

This guide should be used during each meeting between mentor and protégé to record issues and plans for future reference.

As a mentor, you may wish to expand this guide to accommodate your specific needs.

Name of Mentor \_\_\_\_\_

Name of Protégé \_\_\_\_\_

Date of Meeting \_\_\_\_\_

Place of Meeting \_\_\_\_\_

**1. The protégé's self-assessment (for the first meeting)**

It is the responsibility of the Mentorship Director to initiate each meeting between the mentor and the protégé – twice at least, during the first year of the academic/clinical appointment. The subsequent meetings can be organized by the protégé and the report forwarded to the Mentorship Director. In the first six months, mentor and protégé may wish to meet more than once to establish the relationship. About two weeks prior to the first meeting, the protégé should perform a self-assessment in which he/she identifies, prioritizes, and records academic goals. The protégé should assess how he/she is currently meeting those goals, and identify steps which could be taken to facilitate the process. A copy of the protégé's self-assessment should be supplied to the mentor at least a week prior to the meeting.

Before the meeting the mentor should take time to read the self-assessment, identify goals that the protégé may have missed, assess priorities, and think of strategies to assist the protégé in achieving those goals.



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c) List the milestones by which progress will be measured and their anticipated dates for completion.

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d) Identify issues that may be hindering the ability of the protégé to achieve his or her goals; these may include academic barriers, bureaucratic barriers, social barriers, family issues, etc.

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e) Identify ways in which the mentor can assist the protégé to achieve his/her objectives.

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f) List any issues that both the mentor and protégé agree should be brought to the attention of the Department Head, the Division Head, the Program Director and the Institute Director.

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The next meeting will be held: \_\_\_\_\_

Signatures:

Mentor \_\_\_\_\_

Protégé \_\_\_\_\_





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**MENTORSHIP MEETING COMPLIANCE FORM**

(To be signed and sent to the Mentorship Director after every meeting)  
This is to confirm that a mentorship meeting took place.

Signatures:

Protégé \_\_\_\_\_ Mentor \_\_\_\_\_

Time \_\_\_\_\_

Date \_\_\_\_\_

Place \_\_\_\_\_



## VIII: Faculty Engagement/Resources

### Contacts

**Dean's Office** Tom Feasby, MD  
 Dean, Faculty of Medicine  
 TRW Building, 7th Floor  
 3280 Hospital Drive NW, Calgary, AB T2N 4Z6  
 (403) 220-6842

**Faculty Association** 1436 Education Tower  
 2500 University Drive NW, Calgary, AB T2N 1N4  
 (403)220-5722

### Policies and Procedures

Faculty of Medicine: [www.medicine.ucalgary.ca/comm/policiesandforms](http://www.medicine.ucalgary.ca/comm/policiesandforms)  
 University of Calgary: [www.ucalgary.ca/hr/staff/academic\\_staff/agreements/apt\\_manual](http://www.ucalgary.ca/hr/staff/academic_staff/agreements/apt_manual)

### Major Core Facilities

Health Sciences Centre  
 3330 Hospital Drive NW, Calgary, AB T2N 4N1

Heritage Medical Research Building  
 3330 Hospital Drive NW, Calgary, AB T2N 4N1

Teaching, Research and Wellness Building  
 3280 Hospital Drive NW, Calgary, AB T2N 4Z6

### Communications

Communications and Fund Development  
 G 253 Health Sciences Centre  
 3330 Hospital Drive NW, Calgary, AB T2N 4N1  
 (403) 220-2819

### Resources and Articles of Interest

- Make the Right Moves: A practical guide to scientific management for post-doctorates and New Faculty (2004), Howard Hughes Medical Institute and Burroughs Wellcome Fund. [www.hhmi.org/labmanagement.com](http://www.hhmi.org/labmanagement.com)
- David L. Sackett (2001) on the determinants of academic success as a clinician-scientist. Clin Invest Med, Vol. 24, pp 94-100.
- Allan S. Detsky and Mark Otto Boerlocker (2007). Academic Mentoring: How to Give It and How to Get It, JAMA, Vol 297, pp 2,134-2,136

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2. Francis Albert Crew. The Meaning of Death in the Humanist Outlook, ed: A. J. Ayer, 1968 (London: Pemberton)
3. C. J. Bland, C. C. Schmitz, F. T. Striller, R. C. Henry and J. J. Aluise. The Successful Faculty in Academic Medicine, New York: Springer, 1990
4. Miedzinski et al., 2001, Annals RCPSC volume 34 pages 375-379)



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### ACKNOWLEDGMENTS

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